

**CALIFORNIA STATE TREASURER'S OFFICE**

## POSITION DUTY STATEMENT

☒ PROPOSED

☐ CURRENT

DIVISION OR BCA California Achieving a Better Life Experience (CalABLE)					POSITION NUMBER (Agency-Unit-Class-Serial) 822-001-4870-900		Position ID 10647	
UNIT					CLASSIFICATION TITLE Student Assistant			
TIME BASE / TENURE Temporary/Intermittent	CBID E	WWG 2	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 1	WORKING TITLE			
LOCATION Sacramento					INCUMBENT		EFFECTIVE DATE	
<b>STATE TREASURER'S OFFICE MISSION</b>								
The State Treasurer's Office (STO) provides banking services for state government with goals to minimize banking costs and maximize yield on investments. The Treasurer is responsible for the custody of all monies and securities belonging to or held in trust by the state; investment of temporarily idle state and local government monies; administration of the sale of state bonds, their redemption and interest payments; and payment of warrants drawn by the State Controller and other state agencies.								
<b>DIVISION OR BCA OVERVIEW</b>								
BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS CalABLE is a savings and investment plan offered by the state of California to individuals with disabilities. In 2014, the Stephen Beck Jr. Achieving a Better Life Experience Act was signed, known as the ABE Act. It allows individuals with disabilities to open an ABE Account without losing eligibility to public benefit programs. In 2015, Governor Brown signed the California ABE Act which allows qualified individuals with disabilities to open tax-advantaged ABE accounts in California. The CalABLE program officially launched and began accepting enrollees on December 18, 2018. Eligible individuals, family, friends and employers can contribute up to \$17,000 a year without affecting the account beneficiary's public disability benefits.								
<b>GENERAL STATEMENT</b>								
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of CalABLE staff and in a learner capacity, the Student Assistant will assist CalABLE staff with better serving the disability community. Core duties will be related to communications, research, outreach support, compiling and organizing information, and updating databases.								
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.							
50%	Conduct stakeholder outreach efforts, including but not limited to the production of social media posts, newsletter writing, customer service, marketing materials, and stakeholder and event coordination.							
20%	Conduct research related to CalABLE's target demographics, accounts, assets, benchmarks, partnerships, and other programmatic and operational needs.							
15%	Compile and update databases for tracking data related to stakeholders, partnerships, accounts, assets, demographics, trends, and other topics.							
15%	Analyze program needs and opportunities, providing recommendations to CalABLE staff based on independent research, existing data, statutory and regulatory requirements, partnership capabilities, and other important factors.							
5%	Perform other job-related duties as required.							
<b>SPECIAL REQUIREMENTS</b>								
N/A								
<b>To be reviewed and signed by the supervisor and employee:</b>								
<b>EMPLOYEE'S STATEMENT:</b>								
<ul style="list-style-type: none"> <li>I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT.</li> </ul>								
EMPLOYEE'S NAME (Print)				EMPLOYEE'S SIGNATURE			DATE	
<b>SUPERVISOR'S STATEMENT:</b>								
<ul style="list-style-type: none"> <li>I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION</li> <li>I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT.</li> </ul>								
SUPERVISOR'S NAME (Print)				SUPERVISOR'S SIGNATURE			DATE	

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