

POSITION DUTY STATEMENT

STO 1000 (Rev 11/2025)

DIVISION OR BCA ScholarShare Investment Board (SIB)					POSITION NUMBER (Agency-Unit-Class-Serial) 302-002-5157-XXX	Position ID 7521
UNIT					CLASSIFICATION TITLE Staff Services Analyst	
TIME BASE / TENURE Permanent/Full Time	CBID R01	WWG 2	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 1	WORKING TITLE	
LOCATION Sacramento					INCUMBENT	EFFECTIVE DATE
STATE TREASURER'S OFFICE MISSION						
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.						
DIVISION OR BCA OVERVIEW						
BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS The ScholarShare Investment Board (SIB) oversees all activities for the ScholarShare 529 college savings plan and administers the California Kids Investment and Development Savings Program (CalKIDS). Collectively, these programs support access to higher education through tax-advantaged savings and scholarships.						
GENERAL STATEMENT						
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the direct supervision of the Staff Services Manager I (Supervisory), the Staff Services Analyst (SSA) makes recommendations and performs complex duties as an analyst responsible for assisting in various analytical, outreach, and administrative functions for the programs and supports initiatives overseen by the ScholarShare Investment Board.						
% 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.					
45%	<p>Assist in negotiations and developing contracts and purchase orders for various Board-required services; monitor progress and compliance to contracts; support expenditure tracking and budgetary monitoring.</p> <p>Participate in preparation and monitoring requests for proposals (RFPs) and other procurement-related processes for various services and assist in vendor selection.</p> <p>Participate in providing technical and consultative assistance to inquiries that require knowledge of the agency's program(s), as well as policies, and procedures. Assistance includes complex inquiries, written communication, and meetings.</p> <p>Research and consult with management on program-related areas, including but not limited to, regulatory and statutory requirements, compliance, data collection and analysis, reporting, and outreach and marketing strategies.</p> <p>Assist in research and prepare complex and technical analyses and make recommendations to management on a variety of education-related topics.</p> <p>Support business operations for board meetings and activities to ensure organizational efficiency.</p>					
35%	<p>Perform a wide variety of technical, consultative, and analytical administrative support, which may include budget and expenditure planning, budget change proposals, systems development and audit support.</p> <p>Support in developing and implementing Board's policies and procedures. Assists with tracking and analysis of relevant state and federal legislation.</p>					

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	<p>Create reports and relevant data sets and prepare a variety of materials for a variety of Board activities, including but not limited to, Board meetings, statutorily mandated annual reports and communications, response to specific requests, and presentations.</p> <p>Advise management of potentially sensitive or controversial issues, including remedies and recommendations.</p> <p>Support data sharing agreements and research projects that align with the mission of the agency, including but not limited to, handling sensitive data, ensuring all security protocols are followed, and utilizing recordkeeping platforms and systems.</p> <p>Assist with customer service activities for the program(s), including but not limited to, preparing written responses to inquiries from the public, responding to phone calls and inquiries in-office and in the field, processing transactions and other program requests from prospective and existing participants, assist with supporting contracted service support teams to ensure customer inquiries are addressed.</p> <p>Independently develop and apply techniques and methodologies to conduct research, gather data to identify key trends, interpret findings to direct future strategies and efforts for consideration, participate in analyzing and presenting complex data for mandated reporting, review and analyze program reports from program partners and contractors.</p> <p>Support ongoing operational needs of the program(s), including accessing and interacting with recordkeeping technology and coordination with program administrators and contractors. Develop and maintain standard operating procedures and provide recommendations to management as needed.</p> <p>Serve as a liaison to contractors and various departments within the State Treasurer's Office as it relates to a variety of areas, including but not limited to, consulting, data analysis and reporting, procurement, budget, accounting, legislation, legal, information technology, and communications.</p>	
15%	<p>Make recommendations and perform duties as an outreach coordinator as needed to a variety of existing and prospective partners in an effort to meet objectives to market the program(s) to California families.</p> <p>Proactively and strategically assist in collaborating with staff to seek and effectively develop business partnership opportunities through a variety of channels, including but not limited to, utilizing various communication avenues, such as email, letters, and customer relationship management tools; coordinate, organize, and present at meetings and events (in person or virtually); prepare, facilitate, and conduct educational workshops and online webinars, and disseminate information regarding relevant topics.</p> <p>Support the program at various on-site and virtual outreach events and meetings; compose and prepare content for marketing and outreach materials; develop and update the Board's website content.</p> <p>Travel statewide to meet with existing and potential partners and make presentations regarding the program's initiatives.</p>	
5%	Conduct, perform, and assist with various administrative duties that are necessary for the daily operation and overall support of the Board.	
SPECIAL REQUIREMENTS		
Valid CA driver's license and ability to perform overnight travel (as needed)		
To be reviewed and signed by the supervisor and employee:		
EMPLOYEE'S STATEMENT:		
<ul style="list-style-type: none"> ● <i>I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT.</i> 		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
SUPERVISOR'S STATEMENT:		
<ul style="list-style-type: none"> ● <i>I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION</i> 		

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- *I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT.*

SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
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