

## POSITION DUTY STATEMENT

STO 1000 (Rev 11/2025)

DIVISION OR BCA ScholarShare Investment Board (SIB)					POSITION NUMBER (Agency-Unit-Class-Serial) 302-001-5393-003		Position ID 7520	
UNIT					CLASSIFICATION TITLE Analyst II			
TIME BASE / TENURE Permanent/Full Time	CBID R01	WWG 2	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 1	WORKING TITLE Outreach Specialist			
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 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.								
<b>GENERAL STATEMENT</b>								
BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the direct supervision of the Manager I, the Analyst II makes recommendations and performs more complex duties as a marketing and outreach specialist responsible for developing and coordinating key marketing and outreach activities for the programs and 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>Perform duties as an outreach specialist to identify, engage, and build relationships with a variety of partners and stakeholders for the programs in target markets statewide to meet the program(s) statutory mandate to aggressively market to Californians.</p> <p>Research, develop and manage business and strategic partnership opportunities statewide with targeted channel partners, including but not limited to public and private employers and employees, community-based organizations, non-profits, and local educational agencies (LEAs).</p> <p>Coordinate, organize, and present at on-site and virtual events (in person and virtually); prepare and conduct educational workshops and disseminate program information; actively engage with targeted audiences, including but not limited to prospective and existing program partners and participants, by disseminating information, providing program education, or soliciting gathering testimonials and program feedback.</p> <p>Research and make recommendations to management regarding marketing and outreach opportunities to maximize program reach and participation.</p> <p>Develop and implement programs and other activities related to researching marketing and outreach opportunities to access and engage target audiences and make recommendations to management; and review and analyze results and prepare reports and summaries.</p> <p>Represent the agency and its programs at various public-facing events and meetings, including but not limited to, conferences, Board meetings, networking forums, related industry functions, and community events.</p> <p>Develop marketing and outreach materials, content and creative, such as flyers, social media, emails, newsletters, presentations and outreach collateral, using various design tools, software and programs, such as Canva, Microsoft products, and email campaign platforms, to support SIB's programs.</p>						

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	<p>Serve as a spokesperson and subject matter expert for SIB's programs in public relations (PR) activities such as in-person and/or virtual media interviews (television, online, radio) and other related engagements.</p> <p>Coordinate with new and existing partners, contractors, and their team members on executing shared and collaborative efforts and communications to promote the programs to target populations.</p> <p>Assist with customer service activities for the program(s), including but not limited to, preparing written responses to inquiries from the public and responding to phone calls and inquiries in-office and in the field.</p> <p>Provide technical and consultative assistance 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>Travel statewide to meet with existing and potential partners and stakeholders and participate in outreach and education events and presentations to engage with target partners and participants.</p>
30%	<p>Research and prepare complex, technical and consultative analysis of different data sets amongst targeted populations.</p> <p>Collaborate with the communications, external affairs, and/or marketing teams to prepare and deliver talking points, press materials, content for presentations/webinars and general communications (emails and newsletters), and briefing documents for interviews and other related activities.</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, analyze and present complex data for mandated reporting, review and analyze program reports from program partners and contractors.</p> <p>Collect and maintain data for all outreach efforts and results in a customer relationship management (CRM) tool and system; create reports and relevant data sets using CRM tool and other applications, 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>Independently review, analyze, and evaluate completed activities and results, prepare detailed reports and summaries, and make recommendations to management on future strategies and on a variety of college and education-related topics.</p>
20%	<p>Negotiate and develop contracts and purchase orders for various Board-required services; monitor progress and compliance to contracts.</p> <p>Perform a wide variety of complex, technical, consultative, and analytical administrative support, which may include budget and expenditure planning, systems development and audit support.</p> <p>Develop and implement Board's policies and procedures. Assist with tracking of relevant state and federal legislation.</p> <p>Advise management of potentially sensitive or controversial issues, including remedies and recommendations.</p>
5%	<p>Conduct, perform, and assist with various administrative duties that are necessary for the daily operation and overall support of the Board.</p>
<b>SPECIAL REQUIREMENTS</b>	
<b>Valid CA driver's license and ability to perform overnight travel (as needed)</b>	

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To be reviewed and signed by the supervisor and employee:		
<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