

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 7514	
UNIT					CLASSIFICATION TITLE Analyst I			
TIME BASE / TENURE Full Time/Permanent	CBID R01	WWG 2	COI Yes ☐ No ☒	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 Supervisor II, the Analyst I performs duties responsible for various analytical, outreach, and administrative functions 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%	Assist with 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. 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 information and findings to management as needed. Connect with 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. Assist with developing and applying techniques and methodologies to conduct research, gather data to identify key trends, interpret findings and draft future strategies and efforts for consideration, analyze and present data for management review in support of mandated reporting, and review and analyze program reports from program partners and contractors. Contribute to the development and implementation of the Board's policies and procedures. Assist with tracking and analysis of relevant state and federal legislation. Assist with creating reports and relevant data sets and prepare a variety of materials for Board activities, including but not limited to, Board meetings, statutorily mandated annual reports and communications, response to specific requests, and presentations. Identify and analyze potentially sensitive or controversial issues and provide findings and potential remedies to management for consideration.							

	Provide program support services by responding to public and stakeholder inquiries including but not limited to, preparing written responses to the public, responding to phone calls in-office and in the field, processing transactions and other program requests from prospective and existing participants, coordinate with supporting contracted service support teams, such as call centers, to ensure customer inquiries are addressed.
35%	Contribute to the development and implementation of the Board's policies and procedures. Assist with tracking and analysis of relevant state and federal legislation. 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. Provide technical and consultative assistance to inquiries that require knowledge of the agency's program(s), as well as policies, and procedures. Assistance includes inquiries, written communication, and meetings. Support negotiations and the development of contracts and purchase orders for various Board-required services; monitor progress and compliance to contracts; support expenditure tracking and budgetary monitoring. Assist with preparing and overseeing request for proposals (RFPs) and other procurement-related processes for various services and assist in vendor selection.
15%	Perform a wide variety of technical, consultative, and analytical administrative support, which may include analyzing budget and expenditure planning, preparing budget change proposals, systems development, and audit support. Proactively and strategically collaborate 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. Represents 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. Travel statewide to meet with existing and potential partners and make presentations regarding the program's initiatives.
5%	Conduct, perform, and assist with various administrative duties that are necessary for the daily operation and overall support of the Board.

SPECIAL REQUIREMENTS

Occasional evening and weekend work and travel.

To be reviewed and signed by the supervisor and employee:

EMPLOYEE'S STATEMENT:

- *I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT.*

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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SUPERVISOR'S STATEMENT:

- *I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION*
- *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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