State Treasurer's Office

POSITION DUTY STATEMENT

STO 1000 (Rev 11/2025)

DIVISION OR BCA					POSITION NUMBER (Agency-Unit-Class-Serial)	Position ID
California Achieving a Better Life Experience (CalABLE)					822-001-4870-900	10672
UNIT					CLASSIFICATION TITLE	
					Student Assistant	
TIME BASE / TENURE	CBID	WWG	COI	MCR	WORKING TITLE	
Part-time/ Intermittant	E	2	Yes ☐ No ☒	1		
LOCATION					INCUMBENT	EFFECTIVE DATE
Sacramento						

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

CalABLE is California's savings and investment program for people with disabilities. With CalABLE, eligible individuals with disabilities to save and grow their wealth in low-cost, tax-advantaged accounts. CalABLE accounts are exempt from standard asset limits for state and federal benefits programs, providing individuals with disabilities the opportunity to save while protecting their access to public benefits. CalABLE is governed by the CalABLE Board, and the State Treasurer is the chair of the Board.

GENERAL STATEMENT

BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of California Achieving a Better Life Experience (CalABLE) Act 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 partnership development, 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.
40%	Assist the Strategic Partnership Coordinator with outreach to existing and prospective partner organizations. Maintain contact lists, prepare outreach correspondence, coordinate meeting and event logistics, track follow-up items, and help distribute approved CalABLE information to community partners.
25%	Assist in drafting, formatting, and designing informational and marketing materials, including flyers, social media posts, newsletters, website text, presentations, partner materials, and event handouts, subject to staff review and approval. Check materials for clarity, consistency, and accessibility.
20%	Conduct research on target audiences, outreach opportunities, community organizations, geographic gaps, program trends, and comparable initiatives; summarize findings for CalABLE staff.
10%	Update databases and spreadsheets tracking stakeholder contacts, partnerships, outreach activities, events, and other program information; assist with basic summaries and administrative support.
5%	Perform other job-related duties as required.

SPECIAL REQUIREMENTS

N/A

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

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
