



# CalTRUST

## Position Description Outreach & Relationship Manager

### **Background**

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CalTRUST is a joint powers authority that was established to give California public agencies an investment tool to diversify their investment portfolio. As a local government investment pool, CalTRUST offers five fund options and currently holds over \$2.2 billion in assets for over 140 California public agencies. CalTRUST is a small-staff organization governed by a Board of Trustees.

### **Job Description**

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The Outreach & Relationship Manager will work closely with both current and prospective CalTRUST participants; providing outreach/education in order to increase participation in the program and foster ongoing client relationships. This is a full-time position and requires frequent travel, including attendance at roughly a dozen industry conferences annually. CalTRUST is a Sacramento-based entity but CalTRUST staff is able to work from any remote location within the State of California. The ideal candidate will possess a strong attention to detail, excellent interpersonal skills, interest in ongoing professional development, and embrace the challenge of being part of a small, high-functioning team in a remote environment.

### **Job Duties**

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- Establishes, maintains, and enhances the relationship between CalTRUST and both its current and prospective participants.
- Coordinates and conducts education and outreach programs.
- Identifies new growth areas.
- Assists in coordination of CalTRUST newsletters and other written program materials.
- Confers with clients by telephone or in person to provide information about products or services, assists with onboarding paperwork, and assists with account updates.
- Keeps records of customer interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken
- Refers unresolved client issues to designated personnel.
- Contacts clients to respond to inquiries
- Tracks and reports shareholder and performance statistics.
- Manages marketing/outreach, including preparing and executing an annual outreach strategy.
- Identifies target agencies.
- Identifies proper decision makers in target agencies.
- Manages social media.
- Travels throughout California to meet with current and potential CalTRUST participants.

## **Knowledge & Skills Required**

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- Sharp attention to detail.
- Knowledge of principles and processes for providing client and personal services. This includes client needs assessment, meeting quality standards for services, and evaluation of client satisfaction.
- Marketing and outreach strategy.
- Cash management and investment practices for local government entities.
- Relationship management, relationship building skills, network development.
- Establish and maintain effective working relationships with internal staff, public officials, business partners, as well as current and prospective participants.
- Understanding of investment and portfolio management.
- Knowledge of local government organizations.
- Excellent communication and interpersonal skills.
- Excellent active listening skills in giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Writing and speaking clearly and concisely.
- Ability to analyze and research complex issues.
- Ability to explain complex information clearly and simply.
- Reading, comprehending, and analyzing financial statements.
- Confidence and presentation skills.
- Organize and accomplish work with a high degree of independence and initiative.
- Complete work assignments under pressure to meet deadlines.
- Problems solve and prepare potential solutions.
- Proficiency in Office suite software (Word, Excel, Outlook, PowerPoint) as well as Adobe Acrobat
- Knowledge of basic design software, such as Canva.
- Experience in Salesforce database desired, but not required.
- Experience in Wordpress desired, but not required.

## **Minimum Qualifications**

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Bachelor's Degree in business, marketing, finance, government or related field and five years of professional experience in public finance or banking; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

## **Salary & Benefits**

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Salary commensurate with experience. CalTRUST offers a comprehensive benefits package including full medical, dental, and vision coverage for the employee and his/her dependents, life insurance benefits, and participation in a defined benefit retirement program.

## **How To Apply**

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**Application deadline is September 10, 2021.** Submit resume, cover letter, and salary expectation to Laura Labanieh, Chief Executive Officer, [apply@caltrust.org](mailto:apply@caltrust.org). Please be sure to include in your email which position you are applying for. Applications must be directly submitted via email, auto-generated submissions through LinkedIn or other platforms will not be considered.