

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.	
2. Employee's Name (Last, First, M.I.)	8. Department/Agency TREASURY CENTRAL PAYROLL
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) Bureau of Local Government and School Services
4. Civil Service Position Code Description STATE ADMINISTRATIVE MANAGER-1	10. Division Community Engagement and Finance
5. Working Title (What the agency calls the position) Analytics and Outreach Section Manager	11. Section Analytics and Outreach
6. Name and Position Code Description of Direct Supervisor TAYLOR, RODNEY; STATE DIVISION ADMINISTRATOR	12. Unit
7. Name and Position Code Description of Second Level Supervisor FRICK, HEATHER; STATE BUREAU ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 430 W. Allegan St., Lansing, MI. 48922 / Monday - Friday, 8 a.m. - 5 p.m.
14. General Summary of Function/Purpose of Position	
<p>The manager for the Analytics and Outreach Section will assist with supervising, planning, directing, and controlling the operations pertaining to the work activities related to this section. The section has four primary functions: 1) Administering the Protecting Local Government Retirement and Benefits Act (Michigan's Public Act 202 of 2017). 2) Monitoring and analyzing statewide financial and operational data for Michigan's local governments. 3) Identifying local governments that may need resources and delivering technical assistance and other targeted support to those local governments. and 4) Providing training and outreach assistance to support Michigan's local officials. The manager will support all activities related to the review and monitoring of local fiscal health, including the utilization of local fiscal health indicators and other objective operational metrics.</p> <p>Serves as support staff to the Municipal Stability Board as directed by the State Treasure and administration of PA 202 of 2017 (the Act). The manager is responsible for oversight of all Treasury functions related to the Act regarding local pension and retirement health care systems. This oversight includes collecting data, evaluating retirement systems, distributing local determinations, and monitoring underfunded local governments. The manager also supports Treasury and the Bureau of Local Government and School Services in meeting overall goals, strategic planning, and employee engagement activities.</p>	

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 40

The manager for the Analytics and Outreach Section assists with supervising, planning, directing, and controlling the operations related to the administration of Public Act 202 of 2017 (the Act). The manager has primary oversight of all Treasury activities related to the Act.

Individual tasks related to the duty:

- Monitor the database system utilized to collect local retirement reporting data from about 900 local governments statewide and ensure the overall integrity of the data collection process.
- Manage the evaluation system utilized to validate local reporting data and accurately determine funding status for local retirement systems required to report under the Act.
- Review correspondence and ensure timely and accurate distribution of communication to local officials, including funding status, compliance status, reporting requirements, and regular answers to on-going questions.
- Develops and reviews recommendations to the bureau and senior leadership regarding waiver applications sent to Treasury from local governments under the Act.
- Review and distribute recommendations for corrective action plan applications and corrective action plan monitoring certifications in support of the Municipal Stability Board.
- Directs packet preparation, meeting minutes, agendas, and other general administrative duties to ensure the successful administration of the Municipal Stability Board as required under the Act.
- Conducts staff meetings and conferences with staff to discuss operating problems, organization, budgetary matters, personnel matters, technical problems, and the status of programs and projects.

Duty 2

General Summary:

Percentage: 30

The manager for the Analytics and Outreach Section assists with supervising, planning, directing, and controlling the operations pertaining to the analysis of financial and operational health of local governments in Michigan. Manage activities related to the review and monitoring of municipal financial reports and data analytics.

Individual tasks related to the duty:

- Monitor and evaluate local finance documents including cash flow and financial reports.
- Maintain and refine the system utilized to analyze local government data and identify communities that need assistance.
- Track data trends and recommend state support directly to local governments.
- Establishes and coordinates communication strategies with local government financial staff in the development of policies, identifying best practices, and providing technical assistance to support long-term fiscal and operational health.
- Maintains records, prepares reports, and conducts correspondence relative to the work.

Duty 3

General Summary:

Percentage: 20

Coordinate local government training programs related to financial and operational best practices, regulatory compliance, and other topics for municipal financial operations.

Individual tasks related to the duty:

- Oversees the development and implementation of training programs for local government staff; develops and reviews best practice documents for statewide use.
- Holds annual conferences and/or webinars for local government officials to offer guidance and training.
- Makes recommendations and assists with decisions regarding development, enhancement and maintenance of systems that carry out the duties related to municipal financial monitoring.
- Ensures effective internal controls are in place to adequately perform tasks and safeguard resources. Oversees in biennial assessment of internal controls for the community engagement and finance division.

Duty 4

General Summary:

Percentage: 5

Direct, plan, organize and control the work activities of staff in a complex work environment in order to advance the mission and strategic goals of the division, bureau, and the Department of Treasury.

Individual tasks related to the duty:

- Schedules work assignments.
- Reviews completed work.
- Establishes priorities for staff.
- Identifies staff development needs and ensure that training is obtained.
- Conducts performance evaluations.
- Approves sick and annual leave.
- Hires personnel and ensures that appropriate labor relations and employment conditions are maintained.
- Counsels and discipline staff as necessary.
- Researches and resolves complex issues, often with limited information.
- Oversees the development, maintenance, and implementation of procedures, policies, rules regulations and guidelines. Drafts procedural documentation pertaining to accounting activity

Duty 5

General Summary:

Percentage: 5

Perform other duties as assigned. Support Treasury and the Bureau of Local Government and School Services overall goals, strategic planning and employee engagement activities.

Individual tasks related to the duty:

- Provide reports as directed by the Administrator, Bureau Director or Treasury Executive Office.
- Develop and maintain effective working relationships with the external stakeholders and assessment administration community in Michigan.
- Serve as a resource for local units of government related to related financial and operational questions.
- Participates in activities that contribute to the achievement of the mission, goals and strategic objectives.
- Assists in the development of a timely annual program statement for the Bureau of Local Government and School Service on behalf of the section.
- Serves as a liaison for Employee Engagement activities that impact the Bureau of Local Government and School Services and Treasury.
- Prepares special reports as requested.
- Assists with special projects as assigned.
- Performs duties as assigned.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Independent decisions are made when directing the audit/review process and administration of Public Act 202 of 2017. This includes ensuring reviews are conducted correctly, efficiently, and timely. Independent direction within the scope of the department's policies, procedures and laws is given to the manager of the section.

17. Describe the types of decisions that require the supervisor's review.

The Division Administrator or higher needs to approve publication of documents, drafted legislation, and web-based program changes or decisions with a budgetary effect. Any decision that requires a change to existing departmental policy or the establishment of a new policy that as wide political impact must also be approved.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Standard office environment. Some travel may be required.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>
DOSTINE, PATRICK J	DEPARTMENTAL SPECIALIST-2 13	VACANT	DEPARTMENTAL ANALYST-E
GREATHOUSE, CHRISTOPHER J	DEPARTMENTAL ANALYST-E P11	ROSEN, KAYLA J	DEPARTMENTAL ANALYST-E P11
BROUSSEAU, NICHOLAS J	DEPARTMENTAL ANALYST-E P11	MILLER, VERONICA G	DEPARTMENTAL ANALYST-E P11
BOWERMAN, ANN M	DEPARTMENTAL TECHNICIAN-A 10	VACANT	FINANCIAL ANALYST-E
VACANT	STUDENT ASSISTANT-E		

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- | | |
|------------------------------------------------------------------------|------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Complete and sign service ratings. | <input checked="" type="checkbox"/> Assign work. |
| <input checked="" type="checkbox"/> Provide formal written counseling. | <input checked="" type="checkbox"/> Approve work. |
| <input checked="" type="checkbox"/> Approve leave requests. | <input checked="" type="checkbox"/> Review work. |
| <input checked="" type="checkbox"/> Approve time and attendance. | <input type="checkbox"/> Provide guidance on work methods. |
| <input checked="" type="checkbox"/> Orally reprimand. | <input checked="" type="checkbox"/> Train employees in the work. |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential functions of this position?

This position functions as the Analytics and Outreach Section manager to provide on-going support for the Municipal Stability Board (MSB). The employee will work with the MSB to implement the requirements of PA 202 of 2017 and to strengthen the position of local government pension and retiree health care systems. Additionally, the position will assist the Division in analyzing our local units' fiscal and operational health to help identify communities with greater risk. This employee will help develop training and education programs that enhance the knowledge of local government elected and appointed officials and provide them with the tools to enhance decision making. Provide administrative oversight to direct reports and divisional staff.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

Support for the Municipal Stability Board was added. Box 14 was updated to reflect additional functions for the section. Duty 1 was added, and percentage of time spent on other duties were adjusted to accurately reflect how the section identifies and assists our local units. The Division name and organizational structure was updated throughout the PD.

25. What is the function of the work area and how does this position fit into that function?

The function of the work is to serve the Bureau Direction in fulfilling its strategic goals and objectives by developing, implementing, documenting, and maintaining efficient and effective systems in an efficient and effective manner. This will

allow the bureau and department to better analyze data so department leaders can make sound business decisions regarding units of local government. This position functions as the Analytics and Outreach Section manager.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a bachelor's degree in any major. Prefer bachelor's degree in accounting, finance, business administration, public administration, economics or related field.

EXPERIENCE:

Four years of professional experience equivalent to the experience (P11) level or one year equivalent to the advanced (12) level

Desirable: Two or more years of experience dealing directly with local municipalities.

KNOWLEDGE, SKILLS, AND ABILITIES:

Thorough knowledge of state government organization and functions. Thorough knowledge of governmental and/or non-profit fund accounting systems and GASB standards. Ability to plan, develop, and implement new approaches to management and administration. Ability to direct, evaluate, and develop employees. Ability to communicate effectively both orally and in writing. Ability to form strategic working relationships with Treasury and other department personnel. Knowledge of generally accepted accounting principles, auditing procedures, and budgeting.

CERTIFICATES, LICENSES, REGISTRATIONS:

None are required.

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Supervisor

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

None.

I certify that the entries on these pages are accurate and complete.

BONNIE SOMES

Appointing Authority

4/7/2021

Date

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Employee

Date