

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) Saving, Access, and Financial Empowerment (SAFE)
4. Civil Service Position Code Description STATE ADMINISTRATIVE MANAGER-1	10. Division Michigan Education Trust (MET)
5. Working Title (What the agency calls the position) Deputy Director	11. Section
6. Name and Position Code Description of Direct Supervisor PATINO, MEGAN M; STATE DIVISION ADMINISTRATOR	12. Unit
7. Name and Position Code Description of Second Level Supervisor WADE-LOTT, ROBIN R; STATE BUREAU ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 430 W Allegan, Lansing Mi / 8-5, Mon-Fri & some evenings and weekends
14. General Summary of Function/Purpose of Position This position serves as the Deputy Director of Michigan Education Trust (MET) within the Saving, Access, and Financial Empowerment (SAFE) Bureau. MET is an Internal Revenue Code (IRC) Section 529 prepaid tuition program governed by Public Act 316 of 1986, which permits an individual or business to pre-purchase tuition for a Michigan college or university. The Deputy Director is responsible for assisting the MET Executive Director in overall programmatic and administrative functions; reviewing, and updating policies, procedures, and plans for operational functions as well as representing the Executive Director in external and internal outreach. This position will direct the functions of the MET staff by setting work priorities, monitoring accountability and productivity to ensure Division, Bureau, and Department goals are met. In the absence of the Executive Director, this position is responsible for MET program administration, oversight of Michigan Education Savings Program (MESP), MI 529 Advisor Plan (MAP) and the Fostering Futures Scholarship Trust Fund (FFS). MESP is an IRC Section 529 direct-sold investment-based college savings program and MAP is an IRC Section 529 broker-sold investment-based college savings program, both governed by Public Act 161 of 2000. FFS is a scholarship and endowment trust fund governed by Public Act 525 of 2008 as revised in 2014.	

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: 45

Design, implement, maintain, and evaluate MET, MESP, MAP and FFS as assigned by the Executive Director. Prepare reports and evaluate the impact, efficiency, and effectiveness of the programs. Formulate current and long-range programs, plans, and policies for the programs.

Individual tasks related to the duty:

- Provide technical assistance and expertise to staff, purchasers, beneficiaries, higher education institutions and others regarding the MET program.
- Assist the Executive Director to ensure compliance with contractual obligations for program administration of each program including but not limited to program procurement, administration, marketing services, actuarial services, investment services, vendor relations, information technology services and fundraising activities.
- Prepare statistical reports relating to MET and FFS program activities for the Executive Director.
- Evaluate program policies and recommend changes.
- Assist with responses to correspondence and telephone inquiries from college financial aid officials, auditors, the actuary, financial institutions, MET purchasers and beneficiaries to resolve legal, tax and other finance related issues.
- Assist with the development of information for the Annual Report for MET and FFS.
- Assist in the development and monitoring of program budgets.
- Serve as Legal Liaison.
- Serve as marketing committee member.
- Serve as backup liaison for JP Morgan.

Duty 2

General Summary:

Percentage: 25

Analyzes the impact of federal and state legislation, prepares position statements, and presents testimony at hearings. Directs the revision of rules, regulations, and procedures to meet changes in law or policy. Transmits and communicates the Executive Director and MET Board of Directors' views to coworkers and peers within the department and outside the department for implementation.

Individual tasks related to the duty:

- Confers with officials of federal, state, and local agencies, legislators, governor's aides, professional organizations, and interest groups on matters relating to the program.
- Coordinate implementation of new IRC Section 529 amendments and statutory amendments.
- Monitor state and federal legislative activity and provide analysis as it relates to MET, MESP, MAP and FFS.
- Perform special projects and other duties as needed.

Duty 3

General Summary:

Percentage: 20

Provide direction and supervision to MET manager and staff. Select and assign staff to assure equal employment opportunity in hiring and promotions. Identify staff development and training needs. Ensure proper labor relations and conditions of employment are maintained. Conducts staff meetings, conferences, and events regarding open enrollment, customer service, operational issues, budgetary matters, technical problems, and status of programs and projects. Represents Executive Director and interacts with the College Savings Plans Network (CSPN) members. Make presentations to MET Board of Directors as necessary.

Individual tasks related to the duty:

- Select and assign staff ensure equal employment opportunity in hiring and promotions.
- Monitor work standards and ensure they are being met by all staff.
- Provide materials to staff relating to current policy issues and procedures.
- Update staff on seasonal reports and information relevant to their daily activities.
- Oversee and conduct staff development, including coaching/mentoring, and provide adequate training opportunities.
- Ensure performance evaluations, including counseling or disciplinary actions are completed in a timely manner.
- Assist with organization, execution and evaluation of events.
- Communicate with staff, participants and volunteers on event status.
- Lead meetings and conference calls when Executive Director is not available.
- Represent Executive Director at conferences and meetings as needed.
- Serve as media and marketing spokesperson for MET in the absence of Executive Director.

Duty 4

General Summary:

Percentage: 10

Support Treasury's overall goals, strategic planning, Operational Excellence and Employee Engagement activities. Perform other assignments as needed for MET, MESP, MAP, FFS, the SAFE Bureau and Treasury Executive Office.

Individual tasks related to the duty:

- Participate in activities that contribute to the achievement of the mission, goals and operational objectives of the MET and the SAFE Bureau.
- Participate in Operational Excellence and Employee Engagement activities that impact the Bureau and Department.
- Participate in due diligence site visits for out of state vendors that support, MESP, MAP, and the MET information technology system, as needed.
- Prepare special reports as requested.
- Serve on special project teams as assigned.

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

Judgment is used in making decisions where established policies and procedures determine alternatives. Employee will also make independent decisions regarding the setting of work priorities impacting staff, staff development needs and ensuring that employee's area of responsibility achieves overall goals and objectives.

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

In matters concerning interpretation of statutes, changes in established policies and procedures, work priorities, and communicating with the Governor's office, legislators or the media.

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.

Mostly sitting at a desk in an office environment. Outreach events and presentations involve travel, occasional overnight stay, loading/unloading materials for both indoor and outdoor settings. Occasional irregular work schedule.

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>
BARTHELMES, HEATHER	DEPARTMENTAL MANAGER-3 14	WOLCOTT, MATTHEW J	DEPARTMENTAL MANAGER-3 14
HICKS, PRESTON	DEPARTMENTAL MANAGER-3 14		

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 checked="" 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 serves as the Deputy Director of MET (Public Act 316 of 1986) within the SAFE Bureau and reports directly to the MET Executive Director (State Division Administrator). This individual is responsible for assisting the MET Executive Director in overall programmatic and administrative functions; reviewing, and updating policies, procedures, and plans for operational functions as well as representing the Executive Director in external and internal outreach. In the absence of the Executive Director, this employee is responsible for program administration.

Assist the MET Executive Director and interact with the MESP staff and the Michigan Assistant Attorney General (AG) staff to ensure MESP contract compliance with IRC Section 529 and the MESP statute. Assist the MET Executive Director with and interact with the actuarial consultants' staff to ensure their contract compliance. Assist with the analysis of the impact of changes in state and federal policy on these programs.

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

AA requesting to update the PD on file. Updated Bureau and Division name (SAFE) throughout to reflect the current structure that is in place and has been updated throughout. Added Public Act authority for MESP and Fostering Futures Scholarship. Removed specific name of information technology system. Wording and references were updated for consistency and clarity. Duties and essential functions of the position remain the same.

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

MET enters into contracts and accepts lump sum, monthly purchase, and Pay-As-You-Go contract payments from Purchasers to provide future tuition for students at Michigan public, private, and out-of-state colleges and universities. Contract payments are invested to meet the future expected tuition cost of college at Michigan public colleges based on the anticipated year of college enrollment of the student. The function of this work area is to provide support for MET program operations. The primary function of this position is to assist the MET Executive Director with program operations, MESP and MAP oversight, and FFS fundraising.

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.

EXPERIENCE:

State Administrative Manager 15

Four years of professional experience, including two years equivalent to the experienced (P11) level or one year equivalent to the advanced (12) level.

Alternate Education and Experience

State Administrative Manager 15

Education level typically acquired through completion of high school and two years of safety and regulatory or law enforcement experience at the 14 level; or, one year of safety and regulatory or law enforcement experience at the 15 level, may be substituted for the education and experience requirements.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge of financial management principles and practices.
- Ability to communicate effectively.
- Understand and carry out instructions.
- Compare data from a variety of sources for accuracy and completeness.
- Operate standard office equipment.
- Ability to participate in television, radio and newspaper interviews.
- Ability to provide high quality customer service verbal and in writing

CERTIFICATES, LICENSES, REGISTRATIONS:

n/a

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.

N/A

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

CARLA JENKS

Appointing Authority

3/20/2026

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