

**State of Michigan
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. DEPTMGR3C62N

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) Savings Access and Financial Empowerment (SAFE)
4. Civil Service Position Code Description DEPARTMENTAL MANAGER-3	10. Division Michigan Education Trust
5. Working Title (What the agency calls the position) Marketing Manager	11. Section Marketing
6. Name and Position Code Description of Direct Supervisor BARTHELMES, HEATHER; STATE ADMINISTRATIVE MANAGER-1	12. Unit
7. Name and Position Code Description of Second Level Supervisor PATINO, MEGAN M; STATE DIVISION ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 430 West Allegan, Lansing 48922 / M-F 8-5 pm, occasional nights and weekends

14. General Summary of Function/Purpose of Position

This position continues to serve as a first-line manager of professional positions in a complex work area. Position is responsible for managing the various marketing activities, events, and employees for the Marketing section. The position is responsible for analyzing Michigan Education Trust (MET) policies and procedures and making recommendations for revisions in policy and procedure. Manages the analysis of MET contract issues and problems to determine solutions. Provide technical direction of MET digital marketing platforms including website and social media pages. Ensure MET's compliance with state and federal laws, rules, and regulations for MET's website and social media. Oversee MET outreach activities and cultivate relationships with employers, corporate, and school partners. Research and recommend contract purchases to the MET Executive Director and provide input in preparing Requests for Proposals (RFP).

This position will also be responsible for providing detailed and complex information about MET contract options and payment options. Conduct public presentations to increase awareness and promote MET, the Michigan Education Savings Program (MESP) and Fostering Futures Scholarship (FFS) throughout the state. Other duties as assigned.

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: 35

Coordinate supervisory-related activities on behalf of the MET Executive Director, including the hiring, training, and supervising of MET staff.

Individual tasks related to the duty:

- Hire, train, and supervise the activities of MET staff.
- Ensure that appropriate labor relations and employment conditions are maintained.
- Communicate goals and objectives, and provide guidance and assistance with interpretation of laws, rules and regulations.
- Identify staff development needs and ensure that training is obtained.
- Coordinate work, schedule assignments, review completed work, evaluate staff and conduct performance evaluations.
- Counsel and discipline staff as necessary.
- Conduct system and procedural analysis of MET Marketing section.
- Evaluate management methods to increase efficiencies in workflow process.
- Design work measurement and performance standard policies and procedures.
- Assist MET Executive Director with overall administration and management of MET.

Duty 2

General Summary:

Percentage: 35

Manage the various marketing activities, events, and employees for the Marketing section. Responsible for analyzing MET policies and procedures and making recommendations for revisions in policy and procedure. Oversees outreach activities with employers, corporate, and school partners. Oversees the MET marketing team to ensure adequate coverage is provided for MET marketing events. Oversee the implementation and usage of Salesforce/Salesforce Marketing Cloud software to track leads for potential contract purchasers, corporate partners, school partners, and Fostering Futures Scholarship supporters. Create and maintain marketing communication flows for targeted campaigns.

Individual tasks related to the duty:

- Monitors activities between MET marketing vendor and MET marketing staff regarding marketing efforts.
- Conduct ongoing reviews of marketing efforts to ensure outreach activities, promotions and other efforts are relevant and effective.
- Maintain and present monthly and annual contract sales reports, marketing reports and event data reports.
- Discuss issues with staff regarding marketing events, employer relations, or digital marketing platforms and recommend solutions.
- Develop standards of excellence for MET outreach methods and events. Monitor staff performance in accordance with standards
- Conduct ongoing reviews of Salesforce vendor performance to ensure compliance with contract.
- Maintain and oversee procedures for Salesforce/ Salesforce Marketing Cloud software. Oversee program implementation.
- Develop training procedures for Salesforce software.

Duty 3

General Summary:

Percentage: 20

Ensure MET's compliance with state and federal laws, rules, and regulations, as they relate to MET's digital marketing plan. Examine and evaluate MET's social media platforms and website for compliance with Americans with Disabilities Act (ADA) regulations. Provide technical direction of MET digital marketing platforms, including MET website and social media.

Individual tasks related to the duty:

- Analyze the impact of changes in state and federal laws, rules, and regulations, including ADA regulations; recommend and implement changes to ensure compliance.
- Monitor state and federal rules and regulations for changes in the ADA regulations.
- Confer with state and federal officials, professional organizations, and interest groups on matters relating to 529 programs.
- Oversee the maintenance and revision of bureau policies and procedures to meet changes in laws, rules, and regulations.
- Represent MET at state of Michigan Social Media Governance Council meetings.
- Ensure compliance with Michigan Department of Treasury, Saving, Access, and Financial Empowerment Bureau and MET policies and procedures.
- Monitor MET website through "SiteImprove – Quality Assurance Report" for ADA compliance. Make corrections to maintain compliance as needed.
- Update and maintain MET website as needed.
- Oversees the annual development of an email and social media marketing plan to disseminate information electronically to potential and current MET customers.

Duty 4

General Summary:

Percentage: 5

Research and recommend contractual services to the MET Executive Director. Assist with preparing Requests for Proposals (RFPs) and contract compliance activities for marketing vendor contract.

Individual tasks related to the duty:

- Conduct research to determine contractual service needs of MET.
- Oversee the process to obtain needed contracts and contract renewals.
- Research information necessary to determine needs to be addressed for RFPs
- Prepare RFP and submit to Executive Director for approval.
- Provide advice to Executive Director regarding vendor responses to the RFPs.

Duty 5

General Summary:

Percentage: 5

Other duties and special projects as assigned.

Individual tasks related to the duty:

- Participate in management staff meetings.
- Respond to correspondence from MET contract holders, employers, and corporate partners.
- Work with staff, ensure that a systematic approach is taken with the development of annual and long-term marketing plans, as well as develop an ongoing monitoring mechanism that can be used to evaluate the effectiveness of outreach and marketing efforts.

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

Allotting staff workload and deciding the importance of issues brought forward to MET staff, then determining the proper course of action to take. Individual operates with considerable independent judgment.

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

Long-range strategies and policy/procedure changes are decided in conjunction with the MET Executive Director.

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.

This position may require some travel and irregular hours which may add a great deal of stress to the position.

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.

NAME	CLASS TITLE	NAME	CLASS TITLE
ADDISON, ROSS M	DEPARTMENTAL ANALYST-A 12	DECKER, AMY M	DEPARTMENTAL ANALYST-E P11
DAVIS, MAUREEN M	DEPARTMENTAL ANALYST-E P11	MCINTYRE SINGH, KRISTINA	DEPARTMENTAL ANALYST-E P11

Additional Subordinates

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

- | | |
|--|---|
| ☒ Complete and sign service ratings. | ☒ Assign work. |
| ☒ Provide formal written counseling. | ☒ Approve work. |
| ☒ Approve leave requests. | ☒ Review work. |
| ☒ Approve time and attendance. | ☒ Provide guidance on work methods. |
| ☒ Orally reprimand. | ☒ 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?

Position is responsible for managing the various marketing activities, events, and employees for the Marketing section. The position is responsible for analyzing Michigan Education Trust (MET) policies and procedures and making recommendations for revisions in policy and procedure. Manages the analysis of MET contract issues and problems to determine solutions. Provide technical direction of MET digital marketing platforms including website and social media pages. Ensure MET's compliance with state and federal laws, rules, and regulations for MET's website and social media. Oversee MET outreach activities and cultivate relationships with employers and corporate partners. Research and recommend contract purchases to the MET Executive Director and prepare Requests for Proposals (RFP). Other duties as assigned. Includes all the requirements in Section 18.

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 the name of the Bureau from Office of Postsecondary Financial Planning to Savings, Access, and Financial Planning. Updated the Division name to Michigan Education Trust and Section to Marketing. Updated Duty 2 with the addition of Salesforce Marketing Cloud software responsibilities and the expansion of partnership program to include school partners. Removed marketing strategies around Pay-As-You-Go as it is fully integrated as a payment option for MET contracts. Updated box 18 and 23 for accuracy and clarity. Updated Box 25 for clarity and to include all partnerships. The essential duties and functions of the position remain unchanged.

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

This position is responsible for marketing and public relations for the program, both internal and external. MET enters into contracts and accepts lump sum, monthly purchase and pay-as-you-go contract payments from Purchasers to provide future tuition for Michigan residents at Michigan public, private, and out-of-state colleges and universities. Contract payments are invested by the Michigan Department of Treasury Bureau of Investments to meet future college tuition costs at Michigan public universities, based on the anticipated year of college enrollment of the beneficiary (student). The primary function of this work area is to provide outreach and increase awareness of the MET program to potential purchasers, employer partners, school partners and others who might be interested in saving for someone's future higher education.

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:

Departmental Manager 14

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

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge of management methods in order to improve personnel utilization.
- Knowledge of the rules and regulations related to Section 529 college savings programs.
- Extensive knowledge of marketing/public relations best practices.
- Extensive knowledge of the Requests for Proposals (RFP) process and contract compliance.
- Must be able to converse easily and clearly, communicate enthusiasm and ideas to others, be a self-starter,
- Extensive knowledge of training and supervisory techniques and have leadership abilities.
- Ability to plan, direct and coordinate complex projects and work assignments in a team environment.
- Ability to organize, evaluate, and present information effectively.
- Ability to communicate goals and objectives, verbally and in writing.
- Ability to interpret complex laws, rules and regulations.
- Knowledge and ability to evaluate staff performance and conduct performance evaluations.

CERTIFICATES, LICENSES, REGISTRATIONS:

None

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.

CARLA JENKS

8/4/2026

Appointing Authority

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