

Working under general direction of the Capital Finance Director in the Department of Administration, this position is responsible for representing the program nationally, state-wide, and locally and through the College Savings Plan Network and other State-related networks. Communicates with the media and general public relative to the program. In conjunction with the Department's public information officer, responsible for public outreach of the Program through news media, social media, and other channels. Assists with operations of the Wisconsin 529 College Savings Program, its assets, and its state and national accounts, pursuant to Wisconsin and federal law. Serves as staff to the Wisconsin College Savings Program Board, an eleven-member board appointed by the Governor that has program oversight responsibilities.

This position works with other State Department of Administration staff and the State Investment Board to ensure legal and financial requirements of the program are met. Under the direction of the Capital Finance Director, works with program advisors in the execution of investment and other related agreements. Works with the Program Managers in records and investment management, program marketing, investor services and reporting. Assist with duties of other College Investment Program Finance Officers, as needed, and the operations and other functions of the Capital Finance Office and State Budget Office as directed, including but not limited to, policy development and participation in legislative proposals and innovative initiatives under review and development.

#### Goals and Worker Activities

- 35%     A.     Serve as contact with the media, state/federal legislators and state/local/community organizations. Monitor and participate in national 529 organizations and issues.
- A1.     Direct the development and distribution of press releases and articles related to the program and assist in the development of all program materials, correspondence, forms, brochures and procedures.
  - A2.     Act as spokesman for the program in communications with the local and national media and the legislature, or direct inquiries to the Board as appropriate. Attend and participate in outreach activities of the State's 529 Programs and coordinate the attendance and participation of other State officials, contractors, and other, as needed.
  - A3.     Make public presentations related to the program to local, state, and national organization. Develop, direct (as needed), and maintain social media activities relating to the State's 529 Programs.
  - A4.     Review and approve, as needed, ongoing marketing plans and activities, individual print/radio/TV advertising, and other marketing materials. Monitor marketing goals and effectiveness.
  - A5.     Stay abreast of relevant changes in state and federal tax law parallel operations in other states and federal regulations concerning 529 programs. Recommend program modifications based on other states' operations and innovations. Travel to other states as needed to meet with program personnel.
  - A6.     Function as a Wisconsin representative to the College Savings Plan Network, as needed, and participate in national conferences, committees and initiatives.
  - A7.     Meet with and provide information to the State investment Board, other state agencies and legislative service bureaus regarding the program.

- A8. Monitor, develop and/or approve content for the program's main websites maintained by the Program Managers and websites of the Board and Department. Ensure that materials available electronically are in compliance with applicable securities regulations.
  - A9. Responsible for inventory and space management of all supplies and materials related to outreach of the program.
- 20%
- B. Provide direct 529-related service to the public, program participants, and tuition unit account participants
    - B1. Act as a primary 529 resource for incoming calls, correspondence, visitors, inquiries from other state agencies, etc. Prepare or direct the preparation of responses as appropriate.
    - B2. Maintain financial tracking and reporting systems for the program's original tuition unit accounts
    - B3. Work with and direct the state agencies and financial institutions involved with the receipt, investment and accounting of program trust funds.
- 20%
- C. In conjunction with the College Savings Program Board, maintain policy for operation and management of a complex financing program offering investments to individuals for the payment of future higher education expenses.
    - C1. Serve as resource to the College Savings Program Board.
    - C2. Assist in the development of and maintain policies, program fees and expenses, and participation and other agreements for the operation and management of the program.
    - C3. Assist with the preparation of the program's annual report and planning documents required by statute as well as requested ad hoc reports.
    - C4. Prepare, implement and report on the annual administrative budget for program operations.
    - C5. Develop/coordinate proposals for modification of statutes necessary for program administration. Develop and promulgate administrative rules.
    - C6. Exercise prudent financial judgement regarding the protection given to the State and prospective investors.
- 10%
- D. Provide contract administration and oversight, and coordinate the activities of the Program Managers and investment consultants under contract for program operations.
    - D1. Assist in daily interface with the Program Managers for all aspects of program operations, including administration, investment management, records management, marketing, and reporting.
    - D2. Assist with space and records management of all files and records relating to the program
    - D3. Assist with actions needed so that State fiduciary responsibilities related to contracts with the Program Managers are other parties are met; maintain Statement of Investment Policy and Operation or related policies and subsequent documents.

- D4. Monitor, track, and report on performance results of investment options provided by the Program Managers and investment consultant(s) and complete periodic review of such performance against determined benchmarks.
  - D5. Coordinate, prepare, and assist with execution of any necessary contract amendments.
  - D6. Coordinate the annual program audit an outside independent firm.
  - D7. Act as liaison with the Program Managers, representing the Board, Department, and investors/participants.
- 10%
- E. Supervise contracts and contractors as required for effective program operations. Establish and assign contractor responsibilities and oversee performance.
    - E1. As directed, assist in the procurement of program contractors for legal, actuarial, investment monitoring, Program Managers, marketing, or other services needed for program operations.
    - E2. Negotiate contract budgets, scopes of services, amendments, dispute resolution, and timelines.
    - E3. Coordinate the workload and work products of contractors and monitor progress.
- 5%
- F. Participate in policy development and other innovative initiatives of the Capital Finance Office and State Budget Office
    - F1. As directed, meet with public finance and commercial bankers to receive information about new developments in public finance and related programs and provide information about the State's 529 Programs as appropriate.
    - F2. Participate in, conduct, and review special studies and projects assigned to, or initiated by, the Capital Finance Office and State Budget Office.

#### Department of Administration Core Competencies

Department of Administration employees strive to meet or exceed the expectations of the public and other customers by providing efficient, high-quality state government services.

1. Communicator
2. Learner
3. Team Player
4. Role Model
5. Innovator
6. Work Ethic
7. Stewardship

Knowledge, Skill, and Ability Requirements:

1. Thorough knowledge of Section 529 College Savings Program issues and operations, higher education policy and financing issues and the tuition-setting process.
2. Thorough knowledge of program management, including financial tracking and reporting, and budgeting and accounting processes.
3. Skill in customer communications, including marketing, information sharing, and program promotion via social media and internet channels.
4. Thorough knowledge of the legislative and rule-making process.
5. Working knowledge and understanding of financial management and public finance principles, particularly with regard to investment management and the investment decision-making process.
6. Knowledge of the state and federal tax and regulatory implications of different investment instruments.
7. Knowledge of the operation and application of management information systems as they apply to complex program operations involving large numbers of financial transactions. Competency in the operation of word processing, spreadsheet, and relational data base programs.
8. Knowledge of principles and theory of research, policy development, planning and analysis.
9. Ability to provide contract administration and oversight
10. Knowledge of state government operations and policies relating to financial transactions and the investment of state funds.
11. Excellent oral and written communication skills.
12. Ability to work on multiple tasks and exercise sound judgment and discretion when managing complex and sensitive issues.

Special Requirements:

A valid driver's license or ability to provide one's own transportation for site visits