



**Chief Executive Officer**  
**Maryland 529**  
**Recruitment # 18-009608-0001**

**Executive Service – ES8**  
**Salary - \$106,773 ~ 142,646**

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*For immediate consideration, please submit your application materials by close of business,  
November 25, 2018.*

The Chief Executive Officer is the head of the independent State Agency that is responsible for administering three IRC Section 529 Savings Plans; the Maryland Prepaid College Trust, the Maryland College Investment Plan, and the Maryland Achieving a Better Life Experience (ABLE). The Maryland Prepaid College Trust (MPCT) is a “defined benefit” type plan and the Maryland College Investment Plan (MCIP) is a “defined contribution” type plan, both of which are designed to provide ways for families to save for future college expenses and reduce reliance on future student loan debt. In addition, the Maryland 529 agency is responsible for administering the Maryland Achieving a Better Life Experience (ABLE) program that helps individuals with disabilities save money and pay for qualified disability-related expenses without jeopardizing state or federal means-tested benefits such as SSI or Medicaid. The Chief Executive Officer reports to the Maryland 529 Board of Directors, which includes the State Treasurer, State Comptroller, Chancellor of the University System of Maryland, the Secretary of the Maryland Higher Education Commission, the Secretary of the Maryland Department of Disabilities, the Superintendent of Schools, and five public members appointed by the Governor.

Responsibilities include:

- Planning, organizing, directing and controlling all operations of the Plans.
- Creating and maintaining a positive work environment and culture for the Maryland 529 agency and staff.
- Establishing overall Plan goals to accomplish the mission as defined by the Board.
- Ensuring the management, accounting, recordkeeping and oversight of Plan financial transactions meet the requirements of Board fiduciary responsibilities and all national accounting and recordkeeping standards.
- Designing and developing features and enhancements to the MPCT, MCIP and ABLE.
- Administering existing customer accounts.
- Planning, organizing, directing and controlling all operations of the Plans.
- Managing personnel resources of the Agency, including hiring and training staff.
- Oversight of procurement and management of a wide range of outsourced services, including investment managers, financial advisors, actuaries and marketing representatives, as well as program managers for the MCPT, MCIP and ABLE.
- Providing strategic leadership and financial input, framing issues appropriately for the Board to support informed decision making.
- Enabling the effective functioning of the Board through accurate and timely reporting and advising on matters such as matters for approval, current significant issues, updates on strategic goals and plan implementation, key performance indicators for the agency’s organizational units, risk and compliance updates, and any other matters for noting.
- Creating and maintaining a positive reputation for Maryland 529.
- Leading the development of a Marketing and Public Relations Plan.
- Overseeing the development and advocacy of State legislation to enhance the Plans.
- Participating in crafting federal legislation and regulatory polices to enhance 529 plans nationally.

- Serving as lead representative for Maryland's 529 plans in the national industry association, the College Savings Plans Network.
- Monitoring current industry trends, changes and best practices in order to provide timely and relevant advice to the Board.

Specific Competencies:

- Proven experience in financial data analysis with strong financial management background and with working with financial, investment and accounting staff to oversee transactions and recordkeeping.
- Proven experience in public speaking and giving presentations to groups such as government or elected officials, corporate boards, community leaders, sponsors and/or other key stakeholder groups.
- Proven ability to work effectively as a team member, leader and in creating a positive workplace environment and culture.
- Proven ability to work independently, apply and interpret laws, policies and procedures and use of good judgment in evaluating and making decisions.
- Proven ability to effectively prioritize tasks, estimate time frames, meet deadlines, plan and use available resources, and coordinate work assignments with others.
- Proven experience in working with a Board and Senior Management Team.
- Proven experience in procurement and contract management.
- Proven ability to communicate effectively and maintain a courteous attitude toward the public and employees.
- Knowledge of principles and processes for providing customer and personal services including needs assessment techniques, quality service standards, alternative delivery systems and customer satisfaction evaluation techniques.

REQUIRED EDUCATION AND EXPERIENCE:

- Master's Degree in business or related field
- Minimum of 7-10 years of progressive management experience in a financial or executive leadership position

DESIRED SKILLS AND EXPERIENCE:

- Understanding of and experience in managing IRC Section 529 plans
- Financial operations and management background
- Understanding of and experience in oversight of outsourced services and programs

This is an Executive Service position which serves at the pleasure of the Maryland 529 Board. State employment benefits are included, such as paid holidays, vacation, sick and personal days; medical and dental plans; pension plan; 401k/457 plans; paid parking; employee credit union; direct deposit.

All candidates will be subject to a background investigation to include criminal and credit history.

Questions may be directed to Shelly Reid at 410-260-7078. **For immediate consideration, please submit a RESUME & COVER LETTER by November 25, 2018 to:**

Maryland State Treasurer's Office  
 Attn: Human Resources  
 80 Calvert Street, Room 109  
 Annapolis, Maryland 21401  
or [hr@treasurer.state.md.us](mailto:hr@treasurer.state.md.us)  
or FAX: 410-260-4090

*As an equal opportunity employer, the State is committed to recruiting, retaining and promoting employees who are reflective of its diversity.*