



## **Policy Specialist/Program Manager**

**DESCRIPTION:** The Policy Specialist/Program Manager will assist the Deputy Treasurer for Fiscal Operations to develop and implement investment programs and other environmental, energy efficiency and climate-change related activities that support the Treasurer’s policy agenda, conduct research, and communicate policy priorities internally and externally.

### **The Policy Specialist/Program Manager will:**

#### **Program Development and Support**

The Policy Specialist/Program Manager will work under the supervision of the Deputy Treasurer in the development and subsequent implementation and oversight of Treasury investments in programs related to Green Banks, climate change, energy efficiency, alternative energy, microgrids and other electric grid related activities, and similar activities (hereafter, “environmental investments”). Tasks will include:

1. Developing a comprehensive knowledge of existing state-related financing and other programs intended to promote environmental benefits through environmental investments.
2. Developing a working knowledge of the role of the Pennsylvania PUC and its regulatory and programmatic involvement with environmental investments.
3. Overseeing existing Treasury investments in environmental investments from both programmatic and finance perspectives.
4. Working with the Deputy Treasurer and others to identify potential environmental investments and being primarily responsible for investigating and underwriting such investments.
5. Working with Treasury investment staff to develop business and financial details of environmental investments.
6. Representing Treasury in meetings and events in order to explain and promote Treasury’s role in environmental investments.

#### **Shareholder Engagement**

The Policy Specialist/Program Manager will work under the supervision of the Deputy Treasurer in supporting Treasury’s activities as a shareholder in or owner of publicly traded equities and other investment instruments, with particular reference to positions in firms that may have implications for environmental investments. Tasks will include

1. Being responsible to track proxy ballots for firms with implications for environmental investments, developing an understanding of the firms and issues raised by proxy ballots, making recommendations to the Deputy Treasurer and other Treasury officials, and overseeing the voting of Treasury’s proxies.
2. Identifying important issues that would support shareholder engagement with firms with implications for environmental investments, interacting with other like-minded shareholders

or owners, researching and developing engagement campaigns, and interacting with responsible officials of firms.

### **Policy Research & Development:**

The Specialist will work under the supervision of the Deputy Treasurer in the development of a program of policy research on Commonwealth fiscal and investment issues and other initiatives as directed by leadership.

1. Research state programs related to a designated cluster of governmental services, and develops policy recommendations and strategies to the Director to accommodate projected Treasury needs.
2. Design and conduct research on complex policy issues, and develop recommendations.
3. Provide analysis on information submitted to legislative committees.
4. Review program, proposed legislation, other government initiatives, and compatibility with other Commonwealth programs and initiatives and develop a comprehensive reports.
5. Work collaboratively and transparently with others in public policy, business and legal units to ensure alignment between business priorities and public policy goals.
6. Assess and communicate potential government activities back to the Policy Director and research and develop mitigation or enhancement strategies.
7. Work in conjunction with legislative office on analyzing relevant activity at the legislative and executive branches, as well as in other states and ideas from NGOs and advocacy groups and develop a comprehensive report of such activity.

### **Strategic Analysis:**

Provides strategic research analysis and background to the Deputy Treasurer for the further development and implementation of the Treasurer's policy agenda, with special focus on:

1. Integrity, accountability and transparency reforms for government, fiscal discipline and watchdog functions;
2. Financial empowerment initiatives like universal college savings accounts and portable pensions);
3. Innovative approaches to Pennsylvania's economic vitality, particularly around financing of infrastructure and sustainable energy,
4. Monitoring, researching, and advising about emergent issues

### **Reporting and Oversight:**

Develop research and assists in the implement roll-outs and communication strategy for advancing policy goals with the Policy Director to build a strong advocacy plan for the Treasurer's policies. Act

as a liaison with other policy professionals in Legislature, Administration, Federal government, and the NGO community.

**Transparency:**

Improve access to Department information, promote open data initiatives and support use of Department data both within state government and outside it, and engage the public in order for the Department to become a model for transparent government operations.

**Other Duties:**

Perform other duties and lead other projects as directed by the Policy Director.

**Required Knowledge, Skills and Abilities:**

*Required:* Bachelor's degree required; strong interpersonal, and oral and written communication skills. Experience assisting the implementation of complex projects aimed at informing and advancing effective public policy. Demonstrated knowledge of policy-making and issue campaigns at the state level or on economic or finance-related issues. Ability to identify and analyze highly complex policy issues; design and conduct research studies; and develop recommendations. Ability to present complex policy recommendations involving social and economic impacts, in a form conducive to program modification and/or development. Ability to work under short-term and long-term deadlines.

*Applied research and analytical skills:* Demonstrated ability to build relationships among individuals and organizations with a range of interests and perspectives. Ability to exercise a logical and resourceful approach to researching, and evaluating problems.

*Desired:* Advanced degree in economics, public policy, law, public administration, finance, or a related discipline preferred, 3+ years in positions within policy research and development. .

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