

**POSITION #330770**

**Trust Funds Director**

**Benefit Services Bureau Deputy Director**

**POSITION SUMMARY**

As the Benefit Services Bureau (BSB) Deputy Director, this position is responsible for managing and directing the delivery and operations for the benefit services administered by the Department of Employee Trust Funds to WRS participants and beneficiaries. This position also serves as a liaison between the programs and external stakeholders such as legislative and internal audit teams, and participant/annuitant advisory groups, and assists the Director with other external contacts (such as governing boards or vendors) as needed and provide metrics and operational management for the Bureau. This position reports, under general direction, to the Bureau Director of the BSB. In the absence of the Bureau Director, this position acts on their behalf in assuming responsibility and decision-making authority for the bureau.

This position will also focus on managing change from both a personnel and business perspective. This includes managing changes to business processes, systems and technology; facilitating employee development and training; and modifying job responsibilities and organization structures. A primary responsibility is creating and implementing change management strategies and plans maximizing employee and stakeholder adoption and usage, minimize resistance, and align processes and skills with further modernization efforts.

ETF is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs to over 630,000 members receiving \$5.6 billion in retirement benefits and \$1.6 billion in health benefits annually. This position directly supports achieving the department's mission to develop and deliver quality benefits and services to our members while safeguarding the integrity of the Trust. As an employee of ETF, the incumbent will support and create a diverse and inclusive work force.

**GOALS AND WORKER ACTIVITIES:**

**40% GOAL A: Direction of Benefit Services Bureau Operations**

- A.1. Lead operations, plan work, develop procedures, establish priorities and assure coverage of operational functions that conform with Division and Department objectives.
- A.2. Continuously identify business functions and requirements that can be automated, develop proposals, and conduct cost/benefit analyses to implement new automation.
- A.3. Ensure compliance with developed internal control structure for business processes within the Bureau and regularly evaluate the success.
- A.4. Serve as a liaison from the Division of Retirement Services to other Divisions within the Department to assure there is continuity of information and identification of problems and issues at an early stage and to make sure stakeholder interests are represented.
- A.5. Assist in the develop Biennial Budget proposals addressing resource needs of the Bureau and identify alternative approaches to address those resource needs.
- A.6. Identifying operational areas needing enhancement and improvements.

**POSITION #330770**

**Trust Funds Director**

**Benefit Services Bureau Deputy Director**

- A.7. Assist in the direction of the allocation of the Bureau's fiscal year budget including review and approval of overtime, extra time or LTE expenditures, training budget and supplies and services expenditures.
- A.8. Comply with the established managerial standards and core competencies.

**25% GOAL B: Supervision of Assigned Bureau staff.**

- B.1. Supervise, mentor, evaluate, assign work, and train bureau staff.
- B.2. Recommend, initiate, and provide direction to staff in personnel actions such as recruitment and hiring, reclassifications, reallocations, and terminations as needed to ensure effective and efficient daily operations.
- B.3. Develop and implement standards, objectives, and requirements in order to evaluate employee performance, take appropriate disciplinary action, acknowledge or provide formal recognition for good performance and resolve grievances. Review performance evaluation recommendations.
- B.4. Develop, oversee, and support programs assisting in the on-going training and development of employees.
- B.5. Motivate and lead staff to effectively carryout Bureau, Division, and Department missions, objectives, and goals.
- B.6. Provide direction to staff in appropriate motivation and discipline of employees, including the mentor and counsel of employees.
- B.7. Provide direction and assistance in the implementation of the agency's equity and inclusion initiatives as well as health & safety programs.
- B.8. Act in the place of the Bureau Director as directed during their absence or as assigned.

**20% GOAL C: Development and implementation of Quality and Performance Standards.**

- C.1. Align business resources with data framework and business intelligence initiatives.
- C.2. Oversee, and develop as needed, assigned program administration, policy and compliance for programs such as sick leave, ICI, WRS, etc.
- C.3. Monitor program effectiveness through periodic review and analysis of program statistical reports.

**POSITION #330770**

**Trust Funds Director**

**Benefit Services Bureau Deputy Director**

- C.4. Implement, direct and monitor quality improvement strategies, initiatives, performance standards, and projects.
- C.5. Identify, develop or recommend, and implement processes, procedures, and internal/external trainings addressing program deficiencies, compliance, reporting accuracy, and member and employer inquiry trends.

**10% GOAL D: Development and implementation of legislation, administrative rules, and program policy.**

- D.1. Identify, recommend and advocate for policy changes to enhance customer service and simplify administration.
- D.2. Oversee and manage the development and delivery of comprehensive policy training for staff.
- D.3. Make presentations to Executive Management, Division administrators or the retirement Boards on policy matters or customer service issues as requested.
- D.4. Coordinate implementation of new laws, administrative rules, and policies with other Bureaus or Divisions within ETF as necessary.
- D.5. Participate in development of legislative proposals being considered by the Department to provide input on administrative and customer service impact, expressing the impact of such changes on participating employers.
- D.6. Independently develop proposals for policy, administrative rule, and legislative changes for presentation to the Policy Committee or Division Administrator.

**5% GOAL E: Other duties as assigned.**

- E.1. Carry out special assignments to respond to the needs of the Division and Department.
- E.2. Provide support and/or consultation to the Department and other business units as needed.
- E.3. Prepare special reports and recommendations as required.

**POSITION #330770**

**Trust Funds Director**

**Benefit Services Bureau Deputy Director**

**KNOWLEDGE, SKILLS AND ABILITIES:**

1. Knowledge of State and federal laws, rules and regulations governing benefit programs.
2. Knowledge of the principles and practices of employee benefit plan administration and operations.
3. Highly developed written and oral communication skills and techniques including both technical and business communications.
4. Ability to establish productive and efficient working relationships with others internal and external to the organization.
5. Ability to work effectively with others who may have different perspectives, backgrounds, and/or styles.
6. Effective public relations and customer service skills and techniques.
7. Experience applying conflict resolution methods and techniques.
8. Highly developed leadership and managerial skills, including skill in quality improvement, team- and capacity-building, and related administrative management and supervisory techniques.
9. Knowledge of personnel management principles, techniques, and procedures, including methods to assess staff capabilities.
10. Knowledge of staff development and adult training methodologies and techniques.
11. Skill in policy and program development, analysis, evaluation, and oversight
12. Ability to apply new concepts and principles to address problems.
13. Ability to apply strategic planning methods and techniques.
14. Knowledge of quality improvement philosophy, methods and techniques.
15. Knowledge of data gathering, actuarial principles, and interpretation of data and metrics.
16. Knowledge of change management methods and techniques.
17. Knowledge of legislative process.
18. Skill in applying the principles and techniques of sound fiscal management.
19. Ability to understand and comply with all ETF and enterprise security standards, policies, and processes.

(Rev. 08/2022)