

POSITION #336426
Trust Funds Director
Deputy Employer and Contact Services Bureau

14. POSITION SUMMARY

As the Employer and Contact Services Bureau (ECSB) Deputy Director, this position is responsible for managing and directing employer-related operations for the administration of all the fringe benefit programs administered by the Department of Employee Trust Funds. This includes customer service functions in the member and employer communication centers, employer transaction processing; annual Wisconsin Retirement System (WRS) employer/participant reconciliation; enrollment/eligibility functions for ETF administered benefit programs and group health insurance, issuance of departmental determinations; establishing employer education, communication and service policies. In addition, this position is responsible for overseeing operational performance standards and metrics for the Bureau. The Deputy ensures Bureau compliance with Department internal control standards, WI Statute, Administrative Code, and Federal Internal Revenue Code requirements covering public pension systems. This position reports, under general direction, to the Bureau Director of the Employer and Contact Services Bureau. In the absence of the Bureau Director, this position acts on their behalf in assuming responsibility and decision-making authority for the bureau.

These duties require the ability to communicate effectively, both verbally and in writing, to be responsive to needs expressed by Bureau customers, and to deal effectively with time-critical situations and problems. The Deputy Director must be able to make technically and legally sound recommendations in a wide variety of program areas, and develop and maintain effective working relationships with management and staff. The incumbent must possess excellent planning, research and organizational skills as well as demonstrate leadership, creative thinking, initiative and the ability to lead and adapt to change.

As part of the Division of Retirement Services, this bureau serves over 600,000 Wisconsin Retirement System participants and more than 1500 public employers in Wisconsin.

15. GOALS AND WORKER ACTIVITIES:

45% GOAL A: Direction of business operations of the Employer and Contact Services Bureau

Worker Activity

- A.1 Provide leadership for operations, plan work, develop procedures, establish priorities and assure coverage of operational functions that conform with Division and Department objectives.
- A.2 Participate in Division and Department processing, redesign, and implementation. Direct the implementation of new technology within the Bureau and employer section and direct continued reengineering of business functions.
- A.3 Direct and coordinate bureau staff and associated tasks for enterprise-wide projects, such as, modernization.

- A.4 Act on behalf of and with the full authority for the Director during absences.
- A.5 Manage all Bureau and employer section technologies to enhance and maintain “state of the art” communications for members and employers.
- A.6 Continuously identify business functions that can be automated, develop proposals, and conduct cost/benefit analyses to implement new automation.
- A.7 Direct the development of an internal control structure for business processes within the Bureau and regularly evaluate the cost/benefit of this structure.
- A.8 Identify opportunities for improvement through new or changed systems.
- A.9 Develop and monitor short and long-range operational service goals and objectives that are in line with the Bureau, Division, and Agency strategic initiatives and vision.
- A.10 Direct the development, maintenance, and on-going review of Employer WRS and Insurance benefit manuals and other communication tools to ensure resources remain as effective as possible.
- A.11 Serve as a liaison from the Division of Retirement Services to other Divisions within the Department to assure that there is continuity of information flow and identification of problems and issues at an early stage and to make sure employer interests are represented.
- A.12 Develop Biennial Budget proposals that address resource needs of the Bureau and employer section and identify alternative approaches to address those resource needs.
- A.13 Direct the allocation of the employer section’s fiscal year budget including review and approval of overtime, extra time or LTE expenditures, training budget and supplies and services expenditures.
- A.14 Comply with the established managerial standards.

25% GOAL B: Supervision of subordinates.

Worker
Activity

- B.1 Supervise, mentor, evaluate, assign work, and train subordinates.
- B.2 Recommend, initiate, and provide direction to subordinates 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 that assist 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 subordinates 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 Affirmative Action/Equal Employment Opportunity/Diversity, and health & safety programs.

15% GOAL C: Development and implementation of Quality Standards and Performance Measures

Worker Activity

- 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.
- C.4 Implement, direct and monitor quality improvement strategies, initiatives, performance standards, and projects.
- C.5 Perform annual reviews of WRS participating employers to ensure compliance with statutory requirements for enrollment and reportable earnings.
- C.6 Identify, develop or recommend, and implement processes, procedures, and internal/external trainings that address program deficiencies, compliance, reporting accuracy, and member and employer inquiry trends.

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

Worker
Activity

- D.1 Identify, recommend and advocate for policy changes to enhance customer service and simplify administration, especially as it relates to participating employers.
- 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.

Worker
Activity

- 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.

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KNOWLEDGE, SKILLS AND ABILITIES:

1. Highly developed leadership and managerial skills, including skill in quality improvement, team- and capacity-building, and related administrative management and supervisory techniques.
2. Highly developed written and oral communication skills.
3. Ability to establish productive and efficient working relationships with others internal and external to the organization.
4. Knowledge of personnel management principles, techniques, and procedures, including methods to assess staff capabilities.
5. Effective public relations and customer service skills.
6. Ability to work in a rapidly changing and fast paced work environment.
7. Knowledge of conflict resolution methods and techniques.
8. Ability to set short- and long-term goals.
9. Knowledge of staff development and adult training methodologies and techniques.
10. Knowledge of program planning, coordination, implementation and analysis techniques and methods.
11. Knowledge of the principles and practices of employee benefit plan administration and operation.
12. Knowledge of state and federal laws, rules and regulations governing employee benefits programs.
13. Knowledge of Department, Division and Bureau policies and procedures.
14. Knowledge of business process automation.
15. Knowledge of program evaluation methods and techniques.
16. Knowledge of policy development and analysis methods and techniques.
17. Analytical and problem-solving skills.
18. Knowledge of data gathering and statistical analysis methods and techniques.
19. Knowledge of quality improvement philosophy, methods and techniques.
20. Knowledge of strategic planning methods and techniques.
21. Knowledge of change management methods and techniques.
22. Knowledge of data reconciliation techniques.
23. Knowledge of accounting and auditing controls.