

#### 14. POSITION SUMMARY

This position, using considerable independent judgment, is responsible for the strategic planning related to the development and delivery of a comprehensive employer education program for employers participating in any of the insurance plans or other programs administered by the Employer Services Section Insurance Unit. There are over 800 WRS participating employers (state and local entities) that offer a variety of benefits including health, life, or ICI programs; many with multiple positions responsible for enrolling members, assisting retirees, and other transactions to ETF on behalf of program contracts.

This position designs and executes employer education and outreach through the use of the latest adult learning methods using current automated technologies and services. This requires the incumbent to be thoroughly knowledgeable in 1) current best practices of online training methodologies and technologies, 2) insurance benefit program eligibility, enrollment, and reporting criteria, both current and historic, and 3) tracking training and progress of employers. In addition, the incumbent will participate in the continued research of cutting-edge training methodologies and technologies.

This position will lead the review of employer insurance administration manuals and documents, employer bulletins, and online information. This position will also participate in the planning, development, and implementation of benefit policy relating to ETF-administered benefit programs as well as researching, analyzing, and implementing new legislation. This includes participating in the Department's strategic initiatives and investigating policy changes related to ETF's benefit programs.

Under general supervision, this position reports directly to the Insurance Unit Supervisor in the Employer Services Section of the Employer and Contact Services Bureau. Travel throughout Wisconsin with occasional overnights is required.

#### 15. GOALS & WORKER ACTIVITIES

45% GOAL A: Planning, development, implementation, delivery and coordination of employer education program and associated outreach efforts to participating and potential employers in ETF administered benefit programs.

Worker  
Activity

- A.1 Educate employers about current issues and administrative changes in programs, statutes, and rules; to ensure compliance with eligibility, enrollment and reporting requirements and to increase employers' knowledge and skills applicable to the administration of ETF benefit programs.
- A.2 Formulate objectives and establish short- and long-range goals, developing and promulgating a comprehensive employer education philosophy. Ensure that employer education goals and initiatives are consistent with the Department strategic plan.
- A.3 Design plans, write objectives, select methodologies and formats that are most appropriate for audience level of knowledge, size of group, etc.
- A.4 Establish marketing strategies to announce all types of employer education: large group sessions, topical and change-related sessions, appearance at employer groups, video conferences and customized one-on-one training

for new or potential employers and new staff of existing employers.

- A.5 Independently conduct analysis of training effectiveness and identify overall education needs through the use of surveys, forms and/or focus groups of state and local participating employers and ETF staff.
- A.6 Develop, plan and coordinate efforts to educate employers about current issues and administrative changes in statutes/rules as they occur.
- A.7 Explore and utilize video conferencing and teleconferencing techniques (i.e. Webinar, Articulate); adapt training format and methods to accommodate. Apply, as appropriate, new knowledge and state-of-the-art techniques/technologies to ongoing employer education assignments.
- A.8 Plan and coordinate logistics including site arrangements, travel, etc.
- A.9 Evaluate the effectiveness of existing employer education processes and implement strategies to accomplish outreach objectives.
- A.10 Report on progress through written and oral reports as requested/required by upper management.
- A.11 Establish policies and procedures for the administration of the ETF Employer Education Program.
- A.12 Provide coordination, within the Employer & Contact Services Bureau, and management of the development of employer educational materials, including formats, methodologies, technologies, etc.
- A.13 Provide one-on-one training to accommodate potential or new employers and staff turnover at existing employers.

25% GOAL B: Provision of topical research related to changes or proposed changes in statutes, administrative code and/or contracts that impact employers' delegated administration of all administered benefit programs, including insurance programs.

Worker  
Activity

- B.1 Analyze changes or proposed changes to determine impact or potential impact on the employer community.
- B.2 Modify educational programs to ensure implemented changes to statutes, code or contracts are included in future educational sessions/materials.
- B.3 Confer with Program Policy Analysts, Employer & Contact Services Bureau Director, supervisors, managers and others outside of ETF as necessary.
- B.4 Develop research summaries and reports as needed.
- B.5 Assist in review and update of employer administration manuals/bulletins to reflect any changes in rules, statutes, contracts, policies, reporting instructions, etc.
- B.6 Disseminate and socialize answers and explanations to difficult and technical benefit plan policy issues obtained from various resources to employers via oral and/or written communication.
- B.7 Resolve complex benefit plan issues, identified as a result of employer training, and make recommendations to the Bureau Director and/or other appropriate division administrators.
- B.8 Design and implement continuous evaluation of the employer education program to assess satisfaction and service perception. Formulate policies and revise the program based on results.

15% GOAL C: Provision of consultation and technical assistance to participating and potential employers related to the administration of ETF administered benefit programs.

Worker  
Activity

- C.1 Develop a special policy expertise in program policy areas of concern to the employer community.
- C.2 Maintain current knowledge in benefit program areas administered by the Department, keeping up-to-date on state and federal legislative and regulatory changes.
- C.3 Develop employer education, in collaboration with the Employer Compliance & Policy Officer, that is responsive to customer needs.
- C.4 Participate in professional development activities such as training, conferences and review of professional literature to improve/enhance job knowledge and skills.
- C.5 Maintain, develop, and revise the Division's inventory of forms, manuals, and online materials using appropriate computer applications, such as Word, Excel, Adobe, and similar, and employing industry-standard writing styles and techniques.
- C.6 Provide training and support for the annual open enrollment insurance event.

15% GOAL D: Performance of other duties as assigned.

Worker  
Activity

- D.1 Provide supervisor with management information, workload statistics and time reporting data.
- D.2 Recommend operational and procedural changes to supervisor.
- D.3 Lead and coordinate the division implementation of new legislation, administrative rules or contract changes affecting existing insurance plans or the creation of new insurance plans, as assigned by Bureau Director.
- D.4 Provide supplemental training and technical support to new and existing staff as assigned by the Unit Supervisor.
- D.5 Represent the Employer Services Section as a member of the ETF Training Council.
- D.6 Act as a liaison to other sections, bureaus, divisions within and outside the Department.

**KNOWLEDGE, SKILLS, AND ABILITIES**

1. Knowledge of adult education principles.
2. Thorough knowledge of planning, designing, conducting and evaluating diverse and multifaceted training programs for individual and group learning.
3. Excellent group facilitation skills.
4. Highly developed oral and written communication skills.
5. Ability to speak effectively before public gatherings.
6. Ability to interact positively with a variety of persons at different levels within and outside the organization.
7. Thorough knowledge of literature, development and trends in adult training.
8. Planning and analytical skills.
9. Ability to analyze, interpret, and explain laws, rules, policies and procedures.
10. Knowledge of techniques and methods used in policy and issue analysis.
11. Knowledge of methods used to coordinate programs, policies, and procedures for major initiatives having a direct impact on customers.
12. Knowledge of theories, principles, and processes of program planning.
13. Knowledge of theories, principles, and processes of program evaluation.
14. Knowledge of program oversight and monitoring techniques.
15. Problem solving skills.
16. Excellent research skills.
17. Excellent organizational skills.
18. Ability to exercise considerable independent judgment.
19. General knowledge of business practices relating to insurance benefits and personnel practices.
20. General knowledge of statutes, administrative code, contracts and policies relating to benefit plans.
21. Skill in using a variety of computer software packages such as Word, Excel, Power Point and other web tools.
22. Knowledge of strategic planning and goal setting techniques.
23. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.
24. Ability to manage a project related to online presentation, including script-writing and storyboarding.
25. Ability to manage projects.

**SPECIAL REQUIREMENTS:**

- Occasional travel within the state is required.
- Occasional overnights within the state is required.