

## POSITION #335047 - Executive Staff Assistant Supervisor

### 14. POSITION SUMMARY

This position serves as the supervisor of the Staff Services Section and supervises two full-time staff and contractors who provide program and administrative support to ETF Boards, Office of Legal Services and management and operations staff. It also provides administrative and executive staff assistance primarily to the agency's Executive leadership.

This position acts as the primary contact for the Employee Trust Funds Board and oversees the board liaisons who support Group Insurance Board, the Deferred Compensation Board, Wisconsin Retirement Board, and Teachers Retirement Board,.

The position has extensive contact with public officials (Governor's Office, legislators, Board members, Department management staff and other agency officials) and requires an understanding of the agency's roles, responsibilities and programs in order to respond to sensitive and timely inquiries. Good judgment and sensitive discretion in dealing with confidential communications and current/emerging issues are required. The position functions under general supervision and reports to the Assistant Deputy Secretary.

The Department administers numerous benefit programs for current, inactive, and retired public employees. The benefit programs include the Wisconsin Retirement System, group health insurance, group life insurance, deferred compensation, employee reimbursement account, income continuation insurance, long-term disability insurance, duty disability, and long-term care insurance. The Staff Services Section is responsible for coordination of all meetings and activities of the five Boards that oversee the benefit programs; coordination of benefit appeals; providing program support to administrators and office directors, and providing agency-wide administrative services.

## 15. GOALS AND WORKER ACTIVITIES

- 50% GOAL A: Provision of executive staff assistance to the Secretary, Deputy Secretary, Assistant Deputy Secretary, Strategic Council, Agency Management Council, and various internal Department workgroups.
- A.1 Screen, evaluate and prioritize incoming mail and reports received for the Executive Team. Make assignments to Divisions or Offices based on knowledge of Department programs and staff roles. Answer questions as needed and follow-up to ensure completion. Manage the outgoing correspondence and mail.
  - A.2 Answer the Secretary and Deputy Secretary's telephones and screen visitors and callers. Act as case manager by referring callers to appropriate staff for proper response; respond to complaints and problems by obtaining appropriate information, contacting affected personnel to discuss case, communicating policies, and reaching decisions on how to resolve the call or case. Determine urgency and alert Secretary of potential problems.
  - A.3 Coordinate appointments. Maintain the Executive Team's calendars. Assess urgency of meetings and appointments and schedule accordingly. Attend administrative meetings to expand knowledge of Department programs and priorities as required. Initiate and follow through on appointment changes and schedule alterations that may become necessary. Maintain a tickler/reminder system for upcoming meetings and critical deadlines.
  - A.4 Manage the Executive Team's travel arrangements as well as other key managers upon request.
  - A.5 Assist the Executive Team in preparing material for presentations.
  - A.6 Administer the Secretary's Office controlled correspondence system (referrals from the Governor, legislators, other state agencies, etc.) Serve as liaison with the Governor's Office on matters relating

to the Governor's referral letters and coordinate responses with appropriate persons in the Governor's Office. Assess sensitivity and priorities; provide guidance to the Divisions, and follow-up to ensure completion. Reply to general or routing inquiries and bring urgent matters to the attention of the Executive Team.

- A.7 Prepare general correspondence for the Secretary's signature or make direct response on behalf of the Secretary. Determine urgency and timeliness of responses; review responses for appropriateness and consistency with Department policy and objectives. Bring urgent matters to the attention of the Executive Team. Compose and/or type confidential and non-confidential correspondence, memos and reports using knowledge of Department programs, priorities, staff roles, and word processing software capabilities.
- A.8 Assist in developing and implementing administrative procedures and guidelines and recommend alternative solutions.
- A.9 Schedule quarterly section meetings for the Executive Team.
- A.10 In coordination with HR, schedule all new employees for a Meet & Greet session with the Executive Team.
- A.11 Periodically review tracking databases maintained by the Department paralegal and inform the Executive Team of concerns or issues.
- A.12 Collect data, organize information and independently prepare responses to requests for information.
- A.13 Design, evaluate, revise and prepare management reports.
- A.14 Develop and oversee filing systems for the Secretary and as needed by individual members of the Secretary's Office.
- A.15 Maintain general awareness of agency issues, Executive Team's needs, overall workload, and

priorities in order to manage workload to ensure deadlines are met and services are provided.

- A.16 Provide assistance to and prepare agendas/minutes for the Agency Management Council and Strategic Council meetings.
- A.17 Provide administrative support for Board of Managers, Board of Supervisors, and Board of Leads meetings either personally or through assignment to a Staff Services team member.
- A.18 Provide administrative support to the director of the Continuity of Operations Plan (COOP) and director of Strategic Engagement and Government Relations as needed.
- A.19 Oversee the Excellence Award process and other staff recognition.
- A.20 Serve as Secretary's Office, Division and/or Bureau representative on ETF committees and work groups, as assigned.
- A.21 Assist with support services for oversight of CAFR or other large publications/projects so that routing is accomplished correctly and in a timely manner.
- A.22 Maintain petty cash account. Issue reimbursements for approved expenses and reconciliation of records.
- A.23 Manage and maintain filing systems.
- A.24 Maintain knowledge and ongoing awareness of Department values.
- A.25 Provide assistance with special projects, as assigned.
- A.26 Manage Secretary's Office conference rooms.
- A.27 Manage the Secretary's Office meeting calendar and the Support Staff Leave calendar.

25% GOAL B: Management and supervision of the Staff Services Section.

Worker  
Activity

- B.1 Comply with ETF managerial standards at all times.
- B.2 Supervise two staff members (one confidential Executive Staff Assistant and one Paralegal-Advanced) and contract/LTE staff as needed.
- B.3 Provide leadership, plan work operations, assign and monitor work, develop procedures, establish priorities, and ensure that adequate coverage is available for all functions. Ensure phone in Secretary's Office is covered at all times.
- B.4 Analyze organizational structure, work procedures and services provided by the Section, get customer input and implement service delivery improvements.
- B.5 Establish short and long range objectives for the Staff Services Section including establishing operational performance metrics and identify and implement methods and strategies to ensure that Department objectives are met.
- B.6 Develop biennial budget proposals and issue papers identifying the needs and operating plans for the Section relating to staffing, equipment, training, etc.
- B.7 Conduct regular Section staff meetings to solicit ideas and suggestions to improve services and to communicate information gained through participation in management staff and committee meetings.
- B.8 Participate in the recruitment and interview process. Make recommendations on hiring, compensation and reclassification of employees.
- B.9 Counsel, develop position descriptions and performance standards, evaluate, recognize achievements, and discipline staff.
- B.10 Oversee all Section leave accounting, including establishment of work, overtime and vacation schedules.

- B.11 Determine staff training requirements, provide training, technical assistance, and resolve problems. Develop training plan for staff to maintain and improve job skills to meet new job requirements.
- B.12 Assist staff with workload, as required, to ensure satisfactory turnaround times and adequate resources are available
- B.13 Establish and promote effective working relationships between the Secretary's Office, Staff Services Section, and other work units in the Department.
- B.14 Keep abreast of new technology and make recommendations for appropriate equipment and software purchases.
- B.15 Develop and recommend policies and procedures relating to the most effective provision of agency support services using new and existing technology to meet increased workload demands with existing resources.
- B.16 Develop, oversee and monitor the integrity of the Staff Services Section systems in accordance with Department Internal Control Standards.
- B.17 Maintain and renew memberships/subscriptions for the Secretary's Office.

20% GOAL C:

Coordination and oversight of administrative services to the five boards attached to the Department (Employee Trust Funds Board, Wisconsin Retirement Board, Teachers Retirement Board, Group Insurance Board and Deferred Compensation Board).

- C.1 Serve as the primary contact for the Employee Trust Funds Board.
- C.2. Provide leadership to the liaisons of the WR, TR, GIB and DC Boards by conducting regular meetings to plan work operations, assign and monitor work, develop procedures, and establish priorities.
- C.3 Oversee development of agenda and items to be included, based on knowledge of issues (past,

present, and emerging), a review and analysis of past minutes, and discussions with management staff. Coordinate and participate in agenda meetings, briefing executive and management staff by explaining/clarifying agenda items.

- C.4 Review preparation of material for board meetings to ensure accuracy and timely distribution.
- C.5 Assure proper distribution and publishing of open meeting notices to assure compliance with the law.
- C.6 Coordinate administrative support functions necessary to conduct board and committee meetings and conference calls.
- C.7 Research and compose board-related correspondence for routine inquiries.
- C.8 Coordinate orientation of new board members to the responsibilities of the board and the Department.
- C.9 Make travel arrangements for board members.
- C.10 Interpret board member appointment criteria. Monitor status of new board member appointments, term expiration dates and vacancies. Communicate status of board member terms and appointments to Assistant Deputy Secretary. Advise Governor's Office and Secretary of State of any changes in membership. Facilitate filing of the oath of office forms, Senate confirmation notices and payroll documents.
- C.11 Establish priorities to ensure that all deadlines relating to board activities are met.

5% GOAL D: Oversight of the annual Teachers Retirement Board elections, conducted among various teacher and annuitant groups (statewide, Milwaukee, Wisconsin Technical College System employees and retired teachers) and the Employee Trust Funds Board election.

- D.1 Act as Business Lead for development of RFB/RFP to contract with elections vendor.
- D.2 Approve any changes to elections process.
- D.3 Review and approve all communications (ETF website, WRS News; WRS News Online, emails, etc.)
- D.4 Advise the election committees of both Boards and ETF Secretary on the election process, questionable ballots and certified results.
- D.5 Oversee validation of nomination papers.
- D.6 Ensure adherence to existing administrative rule provisions and recommend rule changes as appropriate to update and improve the election process.
- D.7 Evaluate the election process and recommend appropriate technologies and methods for efficiency and cost-savings.



## KNOWLEDGE, SKILLS AND ABILITIES

1. Knowledge of management and supervisory methods and techniques.
2. Leadership skills.
3. Knowledge of Microsoft Office applications (Word, Excel, PowerPoint, Access and Outlook).
4. Knowledge of PC capabilities.
5. Knowledge of problem solving methods and techniques.
6. Knowledge of office equipment.
7. Excellent oral and written communication skills.
8. Excellent human relations and customer service skills.
9. Excellent telephone etiquette skills.
10. Ability to work as a member of a team.
11. Knowledge of analysis and research methods and techniques.
12. Effective organizational skills.
13. Knowledge of time management principles and techniques.
14. Workload prioritization and planning skills.
15. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.