

14. POSITION SUMMARY

Under the general direction of the Deputy Secretary, this position functions as the Chief Benefits Officer (CBO) and administrator of the Division of Benefits Administration (DBA) at the Wisconsin Department of Employee Trust Funds (ETF). The CBO is responsible for the planning and direction of activities related to public sector employer-employee benefit policies, programs, objectives, and initiatives impacting over 680,000 individual members, and over 1,580 state and local units of government in Wisconsin.

The CBO is the agency's principle authority responsible for the development and delivery of policy and group benefits program management, including; defined retirement, survivor, deferred compensation, sick leave credit conversion, and various disability programs. The CBO is also responsible for ensuring the delivery of these benefits and other benefit programs, such as health, life and pre-tax insurance enrollment and eligibility to members.

The Division is the epicenter within the Department, administering benefits using multiple operating models with select benefits administered fully in-house (e.g., defined retirement benefit and duty disability), fully outsourced to a third-party administrator (e.g., deferred compensation), or a hybrid whereby parts of the administration process are managed in-house while others are managed by a third-party administrator (e.g., health, life, income continuation and other insurance benefits).

The CBO provides vision and leadership to the Division of over 150 staff, providing general direction to a team of senior managers as well as collaborating with other key stakeholders within the Department. The CBO is primary contact for external firms such as consultants and actuaries, on topics including policy, legal and regulatory changes, and compliance. The Division is directly responsible for preparing members and their survivors for retirement and serving the monthly payroll function of over 260,000 retirees and their beneficiaries totaling over \$6.8 billion in annual pension payments. The Division utilizes customer experience (CX) to enhance and expand services to our members through multiple channels, including the operation of a call center, a website, online self-service, field presentations, and individual/group retirement and benefit counseling sessions.

The Department has five governing boards, four of which the CBO is a key senior leader responsible for maintaining board member relations and overseeing the coordination and facilitation of board agendas and approvals. The CBO also speaks to various interest groups, legislators and state and national groups about the Department's benefit programs.

The CBO serves as a member of the Department's Strategic Council focused on guiding the strategic transformation and technology modernization to accelerate the ability to engage and serve customers as they prefer. The position also serves on the Department's Portfolio Committee, helping prioritize resources toward the Department's highest operational and strategic priorities.

This position directly supports the agency strategic goal focused on building a talented, diverse, and agile workforce necessary for 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 workforce.

GOALS AND WORKER ACTIVITIES

25% GOAL A: Lead Strategic Benefits Policy and Program Management

- Worker Activity
- A.1 Serve as a member of the Senior Leadership team, including the Strategic Council and Portfolio Committee and implement ETF's mission, goals and strategic initiatives as they relate to the Wisconsin Retirement System and other programs and services assigned to the Division.
 - A.2 Direct the development and implementation of new or revised Wisconsin Retirement System and other benefit programs' policy and procedures necessitated by legislative, policy actuarial assumptions and/or information system changes that impact the determination, delivery and adjustments of benefits to past, current and future participants and their survivors and beneficiaries.
 - A.3 Serve as liaison to national employee benefit groups organized to share information and work with Legislative Liaison to respond to federal legislative proposals that affect the benefit programs administered by the Division.
 - A.4 Represent the Department on matters of retirement and other benefits and services before stakeholders and interested parties, including testifying before legislative committees, influencing legislative initiatives, maintaining working relationships with key legislators, legislative staff, and committees, and presenting to various stakeholders.
 - A.5 Develop and maintain positive working relationships with key organizational peers and build mutual understanding of functional interdependencies.
 - A.6 Participate in the development and management of the Department's overall strategic direction and goals, objectives, and initiatives.

Develop and administer annual business plans for the Division in alignment with the Department's strategic plan.

35% GOAL B. Oversight of Division Programs and Services

Worker Activity

- B.1 Provide policy and general direction to the Division's leadership team.
- B.2 Perform or direct the performance of long- and short-range planning for Division workloads.
- B.3 Oversee development of staffing, training, and succession plans and biennial and operating budgetary requests. Ensure Division resources are managed efficiently and effectively.
- B.4 Oversee the design of customer experience and operational dashboards and use as a tool to monitor Division activities in meeting the Department's mission and strategic plan and the Division's business plan.
- B.5 Ensure operations are conducted in a cost-effective manner and, to the extent possible, within budget resources. Promote continuous improvement.
- B.6 Direct adherence to internal control standards and state and federal compliance.
- B.7 Directs the interpretation and dissemination of information related to laws, rules, policies, and regulations to administer and communicate the changes to customers.
- B.8 Negotiate, develop, update and/or provide oversight of contracts related to Division programs or functions.
- B.9 Prepare responses to the most difficult and sensitive correspondence with customers and stakeholders.
- B. 10 Review, validate and oversee corrective action resulting from program and departmental audits.
- B.11 Ensure division-wide application of the highest fiduciary standards when making decisions regarding program eligibility, member

enrollment and benefit administration operations and services.

- B.12 Review, on a continuous basis, the effectiveness of Division programs and services. Monitor and evaluate Division programs and services and oversee development and implementation of performance improvement and process reengineering projects.

20% GOAL C. Sponsorship of Department Initiatives

Worker Activity

- C.1 Serve as Program Sponsor for the largest and most complex technology project initiatives, including but not limited to Insurance and Pension Administration System. Help set the vision and goals of the program and keep the Division and project team focused.
- C.2 Support the individual Project Sponsors, Business Owners, and Project teams, providing visible leadership. Champion the program objectives with internal and external stakeholders.
- C.3 Guide key decisions and be accountable for the identification and delivery of planned benefits services associated with the program and business design.
- C.4 Monitor the program progress and reinforce program objectives. Stay informed of projects' status and issues.
- C.5 Approves gateway decision recommendations and advisement of the Business Owner.
- C.6 Oversee the implementation of new or revised operational procedures or advocate for any legislative, policy and /or information systems changes to meet the program goals and objectives.
- C.7. In concert with Office of Enterprise Initiatives Director, escalate issues and recommendations to Strategic Council as needed.
- C.8 Assist in addressing internal resource needs, such as the availability of subject matter experts, for the projects of the program.
- C.9 Serve as a transformational change leader ensuring the smooth delivery of change processes in the Division.
- C.10 Sponsor operational readiness post-implementation in terms of key functions and staffing. Plan and oversee post-implementation

optimization period for integration into day-to-day benefits administration.

C.11 Resolve problems and removes barriers unable to be resolved by the individual Project Sponsors and Business Owners.

10% GOAL D. Lead and Facilitate Boards and Meetings

Worker
Activity

D.1 Serve as the senior leader supporting and directly or indirectly managing four boards: Employee Trust Fund Board, Wisconsin Retirement Board, Teachers Retirement Board and Deferred Compensation Board and related committees.

D.2 Develop and maintain relations with Board members. Manage changes in Board membership and work with Board Liaison and Department Leadership to provide orientation to new board members.

D.3 Strategically plan Board agendas in compliance with the Boards' governance manual. Work with Board liaisons to develop Board agendas and identify presenters. Work with presenters to guide content. Review Board materials in advance of meetings to ensure overall goals and objectives of the meeting are met.

D.4 Propose Board policy changes as needed, working closely with other Department units to present such proposals for Board approval.

15% Goal E: Supervision and Management Direction to Division Managers and Staff

Worker
Activity

E.1 Lead the Division leaders and professional staff by inspiring, motivating, setting positive examples, and communicating regularly and effectively. Support Department's core and leadership competencies, performance management practices and employee engagement efforts.

E.2 Consistently demonstrate and promote ETF's core and leadership competencies, serving as a role model to subordinate managers and staff.

- E.3 Provide leadership, supervision, and management oversight to Division leaders in carrying out responsibilities and complying with Department policies.
- E.4 Develop and communicate clear work priorities; adjust as needed.
- E.5 Hold Division staff accountable to meet ETF's core and leadership competencies. Counsel staff on performance. As necessary, implement improvement plans for employees with ongoing performance problems.
- E.6 Oversee recruitment and selection for external hires and internal transfers, reclassifications, recognition, compensation (pay upon appointments, adjustments for reclassifications, market, parity, etc., discretionary compensation and equity/retention awards), professional development, succession planning, discipline, or other personnel actions.
- E.7 Consult with the Office of Talent Management Director regarding workforce planning and other employment relations needs.
- E.8 Performance of other duties as assigned.

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Knowledge Skills, Abilities:

Core Competencies. All employees are responsible for understanding and demonstrating ETF's core competencies:

- Values Differences
- Customer Centric
- Active Learner
- Collaborator
- Communicator

Leadership Competencies. All leaders in the organization are expected to understand and demonstrate leadership competencies:

- Decision Quality
- Ensures Accountability
- Develops Talent
- Drives Engagement
- Instills Trust

Functional Competencies. All leaders in the organization are expected to understand and demonstrate functional competencies relevant to their role:

- Situational Adaptability
1. Highly developed senior leadership and managerial skills. Knowledge of situational leadership methods and techniques to address conflict or opposing views while being authentic, open and professional and able to motivate and persuade others.
 2. Ability to lead an organization or key business unit within an organization with knowledge of methods and techniques to stay organizationally focused while accountable for functional delivery (i.e. Ability to work at strategic and tactical levels)
 3. Highly developed speaking, writing and interpersonal communication skills.
 4. Knowledge of methods for establishing and maintaining working relationships with a variety of internal and external stakeholders with diverse knowledge base.
 5. Knowledge of techniques and methods to strategically plan and execute transformative organization change
 6. Knowledge of program sponsorship roles and responsibilities and skills in leading large business process reengineering and/or information technology initiatives.
 7. High level of learning agility; advocate for learning from mistakes and easily adapts to change and ambiguity
 8. Skills in managing diverse boards and planning and facilitating board meetings to ensure topics discussed are appropriate based on the boards' roles and responsibilities.
 9. Knowledge of policies, procedures, and practices of employee benefit programs (retirement, health, life, and income continuation) and the delivery of benefits to customers.
 10. Knowledge of state and federal laws, rules and regulations governing employee benefit programs.
 11. Knowledge of actuarial principles and techniques.
 12. Knowledge of customer experience (CX) principles and practices.
 13. Knowledge of principles, theories, techniques and trends in public administration and service.

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14. Knowledge of policy analysis, development and implementation methods and techniques.
15. Complex program planning, coordination, implementation, and analysis skills.
16. Knowledge of methods for measuring program performance, operational performance and customer engagement and experience.
17. Knowledge and skills in negotiating contracts and managing vendors.