

POSITION #012081
Trust Funds Supervisor

POSITION SUMMARY

As chief of a Retirement Planning & Outreach Section within the Member Services Bureau, this position is responsible for directing the section in performing high quality and effective customer service functions. These functions ensure accurate and timely benefit information, education, and information is provided to over 650,000 active, inactive and retired Wisconsin Retirement System (WRS) members. Benefit plans administered by the Department include retirement, disability, survivor, and separation benefits, as well as group health, group life, and disability insurance programs. Customer services include responding to written and telephone inquiries, individual member counseling, and preparation and explanation of benefit estimates and other WRS account information. This position has primary responsibility for development and delivery of educational content that is delivered to members through small and large group meetings, both in-person and through virtual offerings. This position also provides oversight of development and delivery of member webinars, videos, e-learning, and other website content. This position will deliver an exceptional customer experience by understanding the customer journey and supporting the understanding with metrics and observation. This position will manage workload and workflow to assure quality and effectiveness of operations and services. Provide direction to staff on the interpretation, application, and implementation of existing and changing laws, rules, and policies governing WRS benefit programs. Work is performed under the general supervision of the Bureau Director. This position requires commitment to creating a diverse and inclusive work force.

GOALS & WORKER ACTIVITIES

40% GOAL A: **Direction of Section Customer Service and Communication Functions**

Worker
Activity

- A.1 Direct staff in effectively offering complete, accurate, and timely information to educate customers and help them take full, legal advantage of their available WRS benefits and to adequately prepare for significant life events such as termination, retirement, disability or death.
- A.2 Direct staff in the accurate interpretation and application of laws, rules and policies governing highly complex WRS programs, benefit rights, and entitlements.
- A.3 Direct staff in providing timely, complete, and accurate responses to member's requests for information. Requests include activities like calculating and creating benefit estimates, applications, account balance statements, service purchase cost estimates, account divisions per Qualified Domestic Relations Orders, and general written responses to complex questions or other member-specific WRS information.
- A.4 Direct staff in providing high quality, customer centric benefit presentations for public and private audiences in large and small groups. Develop presentation schedules timely, accurately, that are built around the customer journey and deliver the experience the way the customer wants while making effective and efficient use of available resources.
- A.5 Direct the ongoing review, maintenance, and enhancement of presentations, and supporting materials through a collaborative process to understand the customer's desired

journey.

- A.6 Ensure that delivery of content is done with the optimal tools and technology available. Support the delivery through metrics-based decisions in support of current and new or changing technology.
- A.7 Ensure staff are adequately and effectively trained on public speaking and the use of needed media, equipment, software, and technology.
- A.8 Direct staff in providing high quality, efficient service, and accurate information to members in one-on-one, small group, and virtual meetings with customers. Follow best practices for delivery methods such as webinars, virtual meeting, and others.
- A.9 Recommend and implement strategies to close gaps in service identified through customer-centric analysis of input.
- A.10 Direct receptionist, front desk and quick service staff in promptly and courteously greeting and assisting walk-in customers. Ensure that the staff consistently reflect a helpful and friendly demeanor and meet standards for quality customer service.
- A.11 Direct the training and training development efforts of the bureau's Trainer and other staff who support training efforts. Ensure training is high quality, that training needs are identified and met, and that adult learning principals are applied by eliminating barriers to progress for the trainers, trainees, and auditors. Monitor results, evaluate progress, and adjust approaches when warranted.
- A.12 Direct the development of the bureau's benefit communications such as publications, forms, brochures, form letters, informational mailers, internet postings, e-news, and other agency media. Ensure material is of a high quality, clear, concise, consistent and developed in an efficient and effective manner.
- A.13 Direct the bureau's cross-trained specialists who assist the department's full-time member call center during periods of need such as peak call volume times. Ensure staff receive needed additional training, that telephony hardware and software are setup and maintained, and that phone coverage schedules balance workload demands while contributing effectively when needs arise.
- A.14 Investigate and provide oral/written responses to more complicated requests and inquiries. Research and draft departmental determination letters for Bureau Director's signature.

30% GOAL B: Supervision of Section Employees

- B.1 Develop and update employee position descriptions. Evaluate and prepare written justification for reclassifications or reallocations as appropriate.

- B.2 Establish employee performance standards; monitor on-going compliance and conduct annual evaluations. Recommend and institute performance improvement initiatives and corrective actions.
- B.3 Assign work and monitor progress, establish timelines and set goals.
- B.4 Manage and maintain leave accounting reporting and vacation schedules.
- B.5 Enforce agency work rules. Recommend and carryout disciplinary actions up to and including discharge. Investigate and attempt to resolve work-related complaints and grievances.
- B.6 Develop recruitment plans, interview candidates and make recommendation on hiring of permanent, project, limited term (LTE) and contract employees to the Bureau Director.
- B.7 Create and maintain a positive work environment that promotes continual learning, teamwork, enhances employee morale and ensures cooperative and effective working relationships with other ETF employees.
- B.8 Support and promote departmental policies and programs including Affirmative Action/Equal Employment Opportunity, Health and Safety, Employee Assistance, Family/Medical Leave, etc.

20% GOAL C: Management of Section Workload and Workflow

- C.1 Evaluate Department's customer service needs and assist Bureau Director in developing short-range and long-range service goals and objectives for Bureau. Implement and monitor quality improvement strategies, initiatives, and projects.
- C.2 Develop and implement work and staffing plans that effectively and efficiently balance demands for customer service coverage during established office hours against the other demands such as deskwork, special and ongoing projects, and requests for leave or flexible scheduling.
- C.3 Analyze workload to identify accomplishments, backlogs, bottlenecks, and other hindrances to productivity and customer service quality. Recommend and implement short-term and long-term corrective measures.
- C.4 Develop and implement plans for Section organization, staffing allocation, temporary staffing, workload shifting, automation, and cross training that effectively meet current and future workload changes.
- C.5 Effectively manage funds allocated for staff overtime and extra hours to ensure maximum benefit and productivity.
- C.6 Identify and recommend changes to improve operational efficiency and effectiveness.
- C.7 Assess Section needs for staffing and other resources. Develop budget proposals with

appropriate justification for Bureau Director to secure required resources.

5% GOAL D: Implementation of new laws, rules, regulations, policies and/or program changes impacting WRS benefits

- D.1 Research, analyze, and interpret new or changing laws, rules, regulations or policies governing WRS benefit programs and determine impact on Section operations and functions.
- D.2 Identify issues, problems, inconsistencies, or contradictions that require clarification and resolution. Communicate assessments and recommendations to the Bureau Director.
- D.3 In coordination with other sections, bureaus and divisions, develop implementation plans and timetables. Identify Section's role in implementation including critical tasks and assignments.
- D.4 Assess Section needs for staffing and other resources to timely and effectively implement changes. Communicate appropriate justifications to the Bureau Director.
- D.5 Direct the development of new and/or revised work instructions and procedures needed to implement changes.
- D.6 Identify, plan, and direct training of staff that is necessary to implement changes.
- D.7 Ensure that business needs are adequately identified, communicated, evaluated, monitored, tested and implemented.
- D.8 Direct efforts to efficiently and effectively identify and revise communications such as forms, brochures, letters, presentations, webinars, and more that are affected by the law change.

5% GOAL E: Provision of Program and Policy Support to Bureau Director and Division Administrator.

- E.1 Provide accurate and detailed information to legislators, attorneys, auditors, third-party contractors, and employers within confidentiality guidelines.
- E.2 Evaluate, recommend, and implement new technologies to improve the efficiency and effectiveness of operations and customer service.
- E.3 Direct and/or serve on work groups, project teams and committees. Perform other special assignments as directed by Bureau Director.

KNOWLEDGE SKILLS AND ABILITIES

1. Oral and written communication skills.
2. Interpersonal skills.
3. Organizational skills and the ability to handle multiple priorities simultaneously.
4. Knowledge of data gathering and statistical analysis techniques and effective research skills.
5. Knowledge of employee and public government benefit program administration.
6. Knowledge of statutes, rules and regulations governing the WRS.
7. Analytical and problem-solving skills.
8. Leadership skills and knowledge of general management principles/ techniques.
9. Knowledge of principles of information system technology.
10. Knowledge of policy analysis and development methods and techniques
11. Knowledge of strategic planning techniques.
12. Knowledge of practices and methods used in issue, policy and program analysis.
13. Knowledge of motivational techniques.
14. Knowledge of grievance procedures and standard progressive discipline concepts as related to personnel rules.
15. Knowledge of and ability to apply customer service skills and techniques.
16. Knowledge of conflict resolution methods and techniques.
17. Ability to work in a rapidly changing and fast paced work environment.
18. Knowledge of supervisory principles and procedures, including methods to assess staff capabilities and performance evaluation.
19. Knowledge of hiring and interviewing methods and techniques
20. Ability to train staff on complex program policies and procedures
21. Ability to set and implement short- and long-term goals
22. Knowledge of project management methods and techniques

23. Knowledge of administrative code and statutory provisions related to benefit plans
24. Knowledge of Affirmative Action policies, Employee health and Safety, employee Assistance programs, FMLA policies.
25. Knowledge of legislative rule, code, policy and program analysis development techniques.
26. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.