

**Trust Funds Supervisor
Benefit Initiation Section 3
Position #039225**

POSITION SUMMARY:

Under the general supervision of the Benefit Services Bureau Director, this position is responsible for directing the Benefit Initiation Section 3 in performing high-quality and effective customer service functions, including responding to employer telephone and written inquiries, as well as supporting the development of employer training and education programs to ensure accuracy in reporting and compliance in accordance with state statute and administrative code. These functions ensure accurate and timely benefit information, education, and training is provided to over 1,500 state and local employers and over 225,000 retirees who participate in benefit programs administered by the Department, including the Wisconsin Retirement System (WRS), survivor and separation benefits, group health insurance, life insurance, and disability insurance programs. In addition, this position is responsible for managing Section workload and workflow to assure quality and effectiveness of operations and services, as well as providing direction to staff on the interpretation, application, and implementation of existing/changing laws, rules, and policies governing WRS and insurance benefit programs.

ETF is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs for more than 665,000 members receiving \$6 billion in retirement benefits and \$1.6 billion in health benefits annually. This position directly supports 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 work force.

GOALS & WORKER ACTIVITIES:

30% GOAL A: Effective management of section workload and operations to maintain quality customer service and standards of performance.

- A.1 Assign and monitor workload on a continuing basis.
- A.2 Analyze section workload reports, establish priorities, and direct corrective action to ensure operating efficiency.
- A.3 Plan, organize and implement instructions governing workflow and statistics for section staff to assure that bureau goals are met.
- A.4 Consult with and provide direct assistance to section employees on the most complex issues.
- A.5 Develop and maintain training programs for both new and existing staff in established or changing program areas.
- A.6 Evaluate, recommend, and implement new technologies to improve the efficiency and effectiveness of office operations and to better serve the needs and demands of employers and members.
- A.7 Assist in the review, development and implementation of needed program procedures, forms, manuals, and informational materials.
- A.8 Analyze present organization structure, systems, procedures, and workload data to identify future enhancements/changes, the effort associated with implementing the enhancement/change, and the related accuracy, timeliness, and cost effectiveness of these enhancements/changes.
- A.9 Develop workload statistics and measurements for section planning and review by the Bureau Director.
- A.10 Analyze section performance on an ongoing basis, communicating any emerging problems and resolution recommendations to Bureau Director.
- A.11 Coordinate activities of this section with those of the other section within the Bureau.

30% GOAL B: Supervision of staff.

- 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. Manage and maintain leave accounting reporting and vacation schedules.
- B.4. Enforce agency work rules. Recommend and carry-out disciplinary actions up to and including discharge. Investigate and attempt to resolve work-related complaints and grievances.
- B.5. Develop recruitment plans, interview candidates, and make recommendation on hiring of permanent, project, limited term (LTE) and contract employees to the Bureau Director.
- B.6. Create and maintain a positive work environment that promotes teamwork, enhances employee morale, and ensures cooperative and effective working relationships with other ETF employees.
- B.7. Support and promote departmental policies and programs including Health & Safety, Employee Assistance, Family/Medical Leave, and Equity & Inclusion.
- B.8. Develop, oversee, and monitor the integrity of (organizational unit) systems in accordance with Department Internal Control Standards.

25% GOAL C: Direction of section customer service and training activities.

- C.1. Direct staff in providing complete, accurate and timely information to employers, participants, and other inquiring parties.
- C.2. Direct staff in effectively providing employer education on eligibility, enrollment and reporting requirements for benefit programs administered by the Department.
- C.3. Direct staff in the accurate interpretation and application of laws, rules and policies governing WRS programs when responding to complex inquiries regarding benefit rights and entitlements.
- C.4. Direct training staff in planning and providing employer training and presentations. identify learning objectives, select instructional methodologies, and evaluate training effectiveness. Ensure employer education and outreach services are scheduled based on need, demand, and past practice.
- C.5. Direct the ongoing review and enhancement of training materials and methods. Provide technical guidance to staff on specialized presentations. Ensure effective use of video conferencing and other electronic media equipment.
- C.6. Develop, review, and recommend revisions to benefit information documents including Employer manuals, forms, brochures, booklets, information mailers, and other agency publications.
- C.7. Direct staff in employer monitoring and tracking of effectiveness of training to ensure compliance with laws and regulations pertaining to the proper administration of WRS benefits.

15% GOAL D: Provision of program and policy support

- D.1. Analyze the department's needs related to employer administration and develop short- and long-range planning documents.
- D.2. Recommend program changes, administrative code changes, policy changes to the Bureau Director.
- D.3. Provide input to Bureau Director for development of Section-wide objectives, policies, and procedures. This includes coordinating a comprehensive update of all section procedures.
- D.4. Provide written interpretation or opinion to Bureau Director on issues, as requested by the Director.

- D.5 Assist in the development of all new service delivery mechanisms stemming from the department's strategic planning initiatives including improving online access to member and employer information online.
- D.6 Provide accurate/detailed information to legislators, attorneys, auditors, 3rd-party contractors, and employers within confidentiality guidelines.
- D.7 Investigate and provide oral/written responses to more complicated requests and inquiries. Research and draft departmental determination letters for Bureau Director's signature.
- D.8 Direct and/or serve on work groups, project teams and committees and perform other special assignments as directed by Bureau Director.
- D.9 Resolve policy and statutory interpretation questions in coordination with the division's policy analyst and Bureau Director.
- D.10 Represent the department in cross-agency, industry, and customer group meetings and events.

KNOWLEDGE, SKILLS, AND ABILITIES

1. Highly developed oral and written communication skills.
2. Interpersonal and team building skills to develop and sustain effective working relationships.
3. Knowledge of effective time management, organizational and priority setting techniques, including the ability to prioritize for effective workload management and handle multiple priorities simultaneously.
4. Knowledge of data gathering and statistical analysis techniques.
5. Knowledge of employee and public government benefit program administration.
6. Knowledge of and ability to interpret and apply State and federal laws, administrative code, rules, and regulations governing the WRS and other ETF administered benefit plans, specifically those related to insurance, retirement, and death benefit eligibility, processing, calculations, and adjustments.
7. Effective critical thinking and analytical skills.
8. Knowledge of research techniques and ability to identify problems and recommend solutions.
9. Knowledge of principles of information system technology.
10. Knowledge of strategic planning techniques.
11. Knowledge of practices and methods used in issue, policy, and program analysis.
12. Knowledge of grievance procedures and standard progressive discipline concepts as related to personnel rules.
13. Excellent customer service skills, including the ability to facilitate difficult and sensitive employee and customer interactions.
14. Knowledge of conflict resolution methods and techniques.
15. Knowledge of supervisory principles and procedures
16. Knowledge of hiring and interviewing methods and techniques
17. Knowledge of methods to assess staff capabilities and performance evaluation.
18. Ability to train staff on complex program policies and procedures.
19. Ability to set short and long-term goals.
20. Knowledge of project management methods and techniques
21. Ability to develop and maintain a work climate that encourages cooperation and teamwork.
22. Knowledge of motivational techniques.
23. Ability to maintain confidential information in accordance with policies, guidelines, and direction from manager.
24. Ability to understand and comply with all ETF and enterprise security standards, policies, and processes.
25. Commitment to creating a diverse and inclusive work force.