

POSITION #336426
Trust Funds Director
Member Services Bureau Deputy Director

POSITION SUMMARY

Under the general supervision of the Member Services Bureau Director, the Deputy Director of the Member Services Bureau is responsible for directing the delivery of services and operations of the Bureau. This includes, but is not limited to, resolving program operational problems, supervising subordinate staff, and developing policies and procedures to carry out the Bureau's programs. This position is responsible for managing and directing the delivery and operations of the primary customer service functions of the Division of Retirement Services, including individual and group counseling of members, preparation of benefit estimates, and written or verbal responses to WRS member inquiries on all retirement and insurance benefit plans. The Member Services Bureau includes a member call center. In the absence of the Bureau Director, this position acts on their behalf in assuming responsibility and decision-making authority for the Bureau.

In a year, the Bureau handles more than 200,000 calls, conducts more than 4,700 individual counseling sessions, provides more than 21,000 written retirement and disability benefit estimates, and educates more than 15,000 members through group presentations and webinars, which are conducted both in person (at ETF headquarters and remotely) and via webinar or video over the Internet.

ETF is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs to over 630,000 members receiving \$5.6 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 AND WORKER ACTIVITIES:

45% GOAL A: Direction of Member Services Bureau Operations

- A.1. Lead operations, plan work, develop procedures, establish priorities and assure coverage of operational functions that conform with Division and Department objectives.
- A.2. Develop and monitor short and long-range operational service goals and objectives that are in line with the Bureau, Division, and Agency strategic initiatives and vision.
- A.3. Ensure compliance with developed internal control structure for business processes within the Bureau and regularly evaluate the success.
- A.4. Serve as a liaison from the Division of Retirement Services to other Divisions within the Department to assure there is continuity of information and identification of problems and issues at an early stage and to make sure stakeholder interests are represented.

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- A.5. Assist in the development of Biennial Budget proposals addressing resource needs of the Bureau and identify alternative approaches to address those resource needs.
- A.6. Identifying operational areas needing enhancement and improvements.
- A.7. Continuously identify business functions and requirements that can be automated, develop proposals, and conduct cost/benefit analyses to implement new automation.
- A.8. Manage all bureau technologies to enhance and maintain a “state of the art” customer service telephone management system.
- A.9. Participate in Division and Department processing, redesign, and implementation. Direct the implementation of new technology within the Bureau and direct continued reengineering of business functions.
- A.10. Direct and coordinate Bureau staff and associated tasks for enterprise-wide projects, such as, modernization.
- A.11. Assist in the direction of the allocation of the Bureau’s fiscal year budget including review and approval of overtime, extra time or LTE expenditures, training budget and supplies and services expenditures.
- A.12. Comply with the established managerial standards and core competencies.

25% GOAL B: Supervision of Assigned Bureau staff.

- B.1. Supervise, mentor, evaluate, assign work, and train bureau staff.
- B.2. Recommend, initiate, and provide direction to staff in personnel actions such as recruitment and hiring, reclassifications, reallocations, and terminations as needed to ensure effective and efficient daily operations.
- B.3. Develop and implement standards, objectives, and requirements in order to evaluate employee performance, take appropriate disciplinary action, acknowledge or provide formal recognition for good performance and resolve grievances. Review performance evaluation recommendations.
- B.4. Develop, oversee, and support programs assisting in the on-going training and development of employees.
- B.5. Motivate and lead staff to effectively carryout Bureau, Division, and Department missions, objectives, and goals.

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- B.6. Provide direction to staff in appropriate motivation and discipline of employees, including the mentor and counsel of employees.
- B.7. Provide direction and assistance in the implementation of the agency's equity and inclusion initiatives as well as health & safety programs.
- B.8. Act in the place of the Bureau Director as directed during their absence or as assigned.

15% GOAL C: Development and implementation of Quality and Performance Standards.

- C.1. Align business resources with data framework and business intelligence initiatives.
- C.2. Oversee, and develop as needed, assigned program administration, policy and compliance for programs such as sick leave, ICI, WRS, etc.
- C.3. Monitor program effectiveness through periodic review and analysis of program statistical reports.
- C.4. Implement, direct and monitor quality improvement strategies, initiatives, performance standards, and projects.
- C.5. Identify, develop or recommend, and implement processes, procedures, and internal/external trainings addressing program deficiencies, compliance, reporting accuracy, and member and employer inquiry trends.

10% GOAL D: Development and implementation of legislation, administrative rules, and program policy.

- D.1. Identify, recommend and advocate for policy changes to enhance customer service and simplify administration.
- D.2. Oversee and manage the development and delivery of comprehensive policy training for staff.
- D.3. Make presentations to Executive Management, Division administrators or the retirement Boards on policy matters or customer service issues as requested.
- D.4. Coordinate implementation of new laws, administrative rules, and policies with other Bureaus or Divisions within ETF as necessary.

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- D.5. Participate in development of legislative proposals being considered by the Department to provide input on administrative and customer service impact, expressing the impact of such changes on participating employers.
- D.6. Independently develop proposals for policy, administrative rule, and legislative changes for presentation to the Policy Committee or Division Administrator.

5% GOAL E: Other duties as assigned.

- E.1. Carry out special assignments to respond to the needs of the Division and Department.
- E.2. Provide support and/or consultation to the Department and other business units as needed.
- E.3. Prepare special reports and recommendations as required.

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KNOWLEDGE, SKILLS AND ABILITIES:

1. Knowledge of State and federal laws, rules and regulations governing benefit programs.
2. Knowledge of Department, Division and Bureau policies and procedures.
3. Highly developed written and oral communication skills and techniques including both technical and business communications.
4. Ability to establish productive and efficient working relationships with others internal and external to the organization.
5. Ability to work effectively with others who may have different perspectives, backgrounds, and/or styles.
6. Effective public relations and customer service skills and techniques.
7. Experience applying conflict resolution methods and techniques.
8. Highly developed leadership and managerial skills, including skill in quality improvement, team- and capacity-building, and related administrative management and supervisory techniques.
9. Knowledge of personnel management principles, techniques, and procedures, including methods to assess staff capabilities.
10. Knowledge of staff development and adult training methodologies and techniques.
11. Skill in policy and program development, analysis, evaluation, and oversight
12. Ability to apply new concepts and principles to address problems.
13. Ability to apply strategic planning methods and techniques.
14. Knowledge of quality improvement philosophy, methods and techniques.
15. Knowledge of data gathering and interpretation of data and metrics.
16. Knowledge of change management methods and techniques.
17. Knowledge of fundamentals of accounting controls.
18. Ability to work in a rapidly changing and fast paced work environment.
19. Knowledge of business process automation.
20. Ability to understand and comply with all ETF and enterprise security standards, policies, and processes.