

Trust Funds Supervisor
Position #318049

POSITION SUMMARY

Under the general supervision of Employer Services Bureau (ESB) Deputy Director, this position is responsible for leading and supervising the Wisconsin Retirement System (WRS) Unit. The WRS Unit is responsible for complex transaction processing for WRS and all Employee Trust Funds (ETF) administered benefit programs, including complex service/earnings issues, departmental determinations for insurance programs and WRS service/earnings, WRS and insurance programs grievance and settlements, WRS annual reconciliation functions, complex employer and benefit staff inquiries, and beneficiary designation and domestic partner affidavit processing.

Specific responsibilities include supervision and management of WRS Unit operations and staff, management of complex transaction processing activities, short- and long-range planning, providing program and policy support, development of procedures and forms, and provision of information to members, employers and other interested parties. This position is also responsible for developing, overseeing, and monitoring the integrity of (organizational unit) systems in accordance with Department Internal Control Standards.

ETF is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs to over 665,000 members receiving \$7.2 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

40% GOAL A: Management of WRS Unit operations

- 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. 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.6. Develop workload statistics for section planning and review by Bureau Deputy Director.
- A.7 Develop and maintain training programs for both new and existing staff in established or changing program areas.
- A.8 Provide input to Bureau Deputy Director for development of Section-wide objectives, policies and procedures. This includes coordinating a comprehensive update of all section procedures.
- A.9 Analyze section performance on an ongoing basis, communicating any emerging problems and resolution recommendations to Bureau Deputy Director.

- A.10 Coordinate activities of this section with those of the other section within the Bureau.
- A.11 Serve as the Bureau point-person for all internal inquiries related to terminations, service and earnings questions.

25% GOAL B: Supervision of staff.

- B.1 Evaluate performance of section employees regularly, based on established Performance Standards, and follow through with appropriate action(s) when necessary.
- B.2 Maintain all section leave accounting, including the establishment of work, overtime and vacation schedules.
- B.3 Participate in the recruitment, interviewing and hiring of section staff. Make recommendations on hiring.
- B.4 Recommend formal disciplinary action of section staff up to and including discharge, to the Bureau Deputy Director.
- B.5 Develop and maintain model position descriptions and allocation patterns for section personnel.
- B.6 Monitor, develop and conduct ongoing staff training and development programs.
- B.7 Provide direction and assistance in the development and implementation of the agency's AA/EEO program.
- B.8 Provide direction and assistance in the development and implementation of the Department's health and safety program.
- B.9 Develop, oversee and monitor the integrity of (organizational unit) systems in accordance with Department Internal Control Standards.
- B.10 Monitor the direction and assistance given by the section lead worker.

15% GOAL C: Serve as WRS expert, providing guidance to internal and external customers.

- C.1 Provide guidance to section staff in responding to complex coverage and eligibility inquiries as well as complex impact reporting.
- C.2 Ensure timely and accurate responses to employers and department staff on complex inquiries and program eligibility questions.
- C.3 Assist in the coordination of the section's functions related to the annual WRS reconciliation of \$10 Billion in WRS earnings reported by participating employers.
- C.4 Approve/deny requests made via grievance/settlement awards to reestablish member accounts, including the evaluation of whether the award represents WRS earnings in accordance with statutes.
- C.5 Provide technical assistance to staff and program members on the statutory requirements for filing/processing beneficiary designations and complex military service papers.

- C.6 Provide detailed information to legislators, administrators, attorneys, insurance agents and employers, within confidentiality guidelines.
- C.7 Provide detailed analysis of member accounts including listing all transactions affecting the account since coverage begin date.
- C.8 Research employer/member requests for account corrections or insurance program eligibility and draft departmental determinations, in accordance with applicable statutes and rules, for the division administrator's signature, approving or denying these requests.
- C.9 Provide feedback and advice to the Bureau's employer trainers on topics that should be addressed in training.

10% GOAL D: Provision of program and policy support to Bureau Deputy Director.

- D.1 Analyze the department's needs related to employer administration and develop short- and long-range planning documents.
- D.2 Obtain resolution of policy and statutory interpretation questions in coordination with the division's policy analyst and Bureau Deputy Director.
- D.3 Recommend program changes, administrative code changes, policy changes to the Bureau Deputy Director.
- D.4 Provide written interpretation or opinion to Bureau Deputy 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 Research and recommend strategies to improve the functioning, comprehensiveness and timeliness of employer communications.

10% GOAL E: Review, development and implementation of program procedures, forms, and informational materials.

- E.1 Develop and revise new and existing procedures and forms.
- E.2 Review existing informational materials and recommend changes as necessary.
- E.3 Obtain staff input in procedure and form review.
- E.4 Implement use of new procedures and forms within the Section.
- E.5 Coordinate Section's use of revised or new procedures with operation of other departmental units to assure smooth implementation of changes.
- E.6 Monitor feedback on implementation of revised or new procedures and forms.

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 research, data gathering, and statistical analysis techniques.
5. Knowledge of employee and/or 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
7. Effective critical thinking, problem-solving, and analytical skills
8. Knowledge of principles of information system technology.
9. Knowledge of strategic planning techniques, including the ability to set short- and long-term goals
10. Knowledge of practices and methods used in issue, policy and program analysis.
11. Customer service skills and techniques, including the ability to facilitate difficult and sensitive employee and customer interaction
12. Knowledge of conflict resolution methods and techniques.
13. Ability to work in a rapidly changing and fast paced work environment.
14. Knowledge of supervisory principles and procedures
15. Knowledge of methods to assess staff capabilities and performance evaluation
16. Ability to train staff on complex program policies and procedures
17. Knowledge of project management methods and techniques
18. Knowledge of the fundamentals of accounting and auditing controls
19. Knowledge of methods and techniques for processing complex payroll and benefits transactions
20. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures including confidentiality.
21. Commitment to creating a diverse and inclusive work force.