

## **Position Summary**

Under general supervision of the Human Resources Director in the Division of Management Services, Bureau of Human Resources, this professional position serves as the Equity & Inclusion Officer and Medical Coordinator for the Department of Employee Trust Funds. Under the program direction of the Secretary's Office, the incumbent is responsible for the creation, development, implementation, administration and evaluation of equity, diversity, affirmative action, equal opportunity, and civil rights compliance programs affecting the agency's permanent, project and contractor staff.

The Equity & Inclusion Officer is responsible for the development and oversight of departmental activities and procedures pertaining to ETF's Equity & Inclusion Plan and assisting the HR Director in the implementation of corresponding Strategic Goal 3 initiatives. This position will also develop and deliver training in a variety of employee development topics. The incumbent will partner with the agency Training Officer and Learning & Development team to deliver training to management and staff.

Additionally, as the ETF Medical Coordinator this position ensures agency compliance with state and federal laws, statutes, and codes related to employee medical leaves of absence, return to work issues, reasonable accommodations, and fitness for duty evaluations and determinations. This position will work with Payroll & Benefits staff to ensure accurate and timely eligibility notices to employees and the management of their leave of absences.

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 the agency strategic goal focused on building a talented 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.

## **Goals and Worker Activities**

### **30% A. Manage Agency's Equity & Inclusion Program**

1. Develop agency EEO/AA policies and procedures in accordance with state administrative codes and rules.
2. Function as the Equity and Inclusion Officer and direct the development and implementation of all Equity and Inclusion program policies and procedures and ensure adherence to federal and state laws and rules related to EEO/AA and civil rights.
3. Serve as Secretary's representative and provide direction and assistance to ETF's AA Committee to ensure committee goals are accomplished and also provide status reports as requested.
4. Develop and execute ETF's biennial Equity and Inclusion Plan through collaboration with internal and external stakeholders regarding content and monitor progress via quarterly ETF progress reports and annual DPM progress reports. Resolve problems with execution of plan.

5. Identify potential EEO/EI problems, propose solutions, and present finding to the HR Director or ETF Secretary.
6. Provide trainings, information, and other tools to agency leadership, managers, supervisors, and the AA Committee on the plan and their respective responsibilities.
7. Provide technical expertise and guidance to the agency Affirmative Action Advisory Committee (IDEA Committee) including but not limited to coordination of the annual nomination and appointment process for new committee members, develop, coordinate and participate in relevant events and activities promoting equity, diversity, and cultural awareness.
8. Represent ETF interests to the Equity and Inclusion Council and serve as agency liaison with the Bureau of Equity and Inclusion and other Division of Personnel Management (DPM) workgroups such as the Equity & Inclusion Officers' Council.
9. Conduct periodic top management briefings on the effectiveness of ETF's EI/EEO program.
10. Develop and monitor a confidential exit interview program to identify workplace issues and recommend actions/changes to the HR Director and Secretary's Office.
11. Coordinate the distribution of the employee disability self-identification survey.

**30% B. Administer the Agency's Employee Leave and Medical Program**

1. Develop and administer the agency's policy and procedures for employee/family medical leave according to state and federal statutes and codes.
2. Act as primary contact for medical leave requests. Review requests for required information (e.g. reason for leave, medical documentation, work restrictions).
3. Coordinate with payroll and HR Supervisor to determine eligibility for coverage under state and/or federal family medical leave acts (FMLA).
4. Issue FMLA eligibility and/or designation notices to employees.
5. Provide department-wide medical leave consultation to managers, employees, and HR staff.
6. Assist supervisors and employees with return to work issues and temporary restrictions or accommodations.
7. Provide consultation on the fitness for duty/Independent Medical Exam (IME) process.
8. Assist employing units with the IME process. Coordinate IMEs with employees and 3rd party providers.

9. Determine the need for additional medical evidence and develop questions for doctors and other treating sources.
10. Coordinate the job search and/or medical separation process.
11. Assure proper file and record maintenance.

**15% C. Provision of Recruitment & Selection Technical Guidance**

1. Work collaboratively with HR staff and Department managers to address EEO/AA issues and promote recruitment and retention of a qualified and diverse workforce.
2. Ensure the integration of EEO/AA policies and procedures in the employment processes related to recruitment, staffing, classification, testing, career development opportunities, and other related personnel activities.
3. Assess the impact of civil service hiring rules and practices on EEO/AA goals. Draft recommendations and strategies to address issues.
4. Partner with HR Specialists to develop specialized recruitment options and strategies to help achieve agency AA goals.
5. Assess and provide guidance about EEO/AA impacts of reorganizations, layoffs, and employee discipline.
6. Review Selection Assessment Strategies (SAS) and make recruitment recommendations as needed.
7. Provide HR Specialists or supervisors with resources to assemble a balanced interview panel according to policy.
8. Review and approve interview questions and benchmarks. Make recommendations for changes when necessary.
9. Review and approve supervisor written hiring reasons and justifications for hire of non-target group candidates when appropriate. Forward denied requests to the Appointing Authority for discussion and resolution.
10. Assist and coordinate ETF's participation in internship program(s) to ensure and diverse and inclusive experience for students and applicants such as State of Wisconsin Student Diversity Intern Program (SWSDIP).
11. Provide career counseling to employees and applicants seeking information about employment at ETF and state government.

**10% D. Administer the Department's Reasonable Accommodation Program**

1. Develop agency policy and procedures for reasonable accommodations according to state and federal statutes and guidelines.
2. Act as primary contact for reasonable accommodation requests. Review requests for required information (e.g. requested accommodation, medical documentation, and work restrictions).
3. Determine eligibility for coverage under the WI Fair Employment Act (WFEA) or Americans with Disabilities Act (ADA).
4. Determine the need for additional information and develop appropriate questions to conduct the interactive process.
5. Review medical evidence to determine the extent of restrictions and develop accommodation plans in accordance with the requirements of the ADA and related case laws.
6. Responsible for reviewing positions to assure that they meet the functional limitations of an individual and if a position can be accommodated for the person.
7. Identify positions available as reasonable accommodations for employees with disabilities and coordinate with employing units to place employees appropriately.
8. Assure accommodations are carried out and are effective. Recommend adjustments as needed.
9. Consult with Office of Legal Services liaison for legal guidance when needed.
10. Respond to requests from Legal Services about accommodation issues or cases.

**5% E. Manage the Department's Informal Complaint Process**

1. Act as primary contact for employee complaints and workplace climate issues.
2. Conduct fact finding investigations into complaints and issues. Make recommendations to address issues.
3. Consult with HR Director on cases and provide updates to Legal Services liaison as needed.
4. Prepare findings and present to executive leadership, managers and employees.
5. Respond to Legal Services requests for information on ERD and EEOC complaints as needed.

**5% F. Administer the Employee Assistance Program (EAP) contract.**

1. Serve as the EAP contract expert for the department. Maintain knowledge of services available from the EAP provider.
2. Develop the purchase order for the EAP contract. Make periodic payments to the EAP provider in accordance with the provisions of the contract.
3. Coordinate EAP trainings for staff.
4. Disseminate brochures and other information from the EAP provider to employees.
5. Maintain EAP information on FRED where appropriate.
6. Refer employees to the EAP provider as needed.
7. Attend statewide EAP meetings and training events.

**5% G. Performance of Miscellaneous Duties as Assigned**

1. Research, analyze and draft human resource training materials for areas of expertise.
2. Commitment to creating a diverse and inclusive work force.
3. Perform other duties as assigned.

**Knowledge, Skills, and Abilities**

1. Knowledge of EEO/AA federal and state laws and rules, legal standards and requirements relating to employment and assessment of human behaviors to include AA/EEO, equity and inclusion principles, state and federal statutes or codes, etc.
2. Understanding of Wisconsin Administrative Codes, Sections ER and ER-MRS, Wisconsin Statutes Chapter 230, the Wisconsin Human Resource Handbook and the Compensation Plan.
3. Knowledge of coaching, facilitation, mediation, and conflict resolution techniques.
4. Skills in planning, developing, implementing and evaluating policy, programs, and procedures.
5. Skill in leading and facilitating teams/work groups, conducting meetings, and guiding work teams on large projects.
6. Knowledge of human resource principles and practices including recruitment/staffing, compensation, classification, labor relations, training, payroll, benefits, and AA/EEO.
7. Ability to ensure confidentiality and safeguard sensitive information.

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8. Ability to conduct research, gather information and analyze a variety of data.
9. Advanced and effective communication skills including presentation skills, advanced verbal and written communication, etc.
10. Ability to effectively work in a team environment and independently establish and maintain collaborative working relationships with a variety of individuals including but not limited to others internal and external to the organization.
11. Knowledge of basic statistics reporting methods and assessment analysis, including reliability and validity, etc.
12. Knowledge of principles and practices of quality improvement programs, and issues including understanding of customer needs and satisfaction, continuous improvement and development of measurable performance measures.
13. Ability to prioritize, organize, and manage time and multiple priorities.
14. Ability to use computer-based, complex software systems (e.g., Microsoft Office applications such as Word, Excel, Access, PowerPoint, OneNote, HRIS, Cornerstone, other systems as needed, and etc.).
15. Ability to understand and successfully meet the agency's core performance competencies.
16. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.