

**Position #300083**

**Trust Funds Director (Member Services Bureau Director)**

**POSITION SUMMARY**

Under the general supervision of the Deputy Administrator of the Division of Benefits Administration, the Director of the Member Services Bureau provides strategic leadership to 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 Benefits Administration, including individual and group counseling of members, preparation of benefit estimates, and responding to WRS member inquiries on all retirement and insurance benefit plans. The Member Services Bureau includes a member call center.

In a year, the Bureau handles more than 225,000 calls, conducts more than 4,700 individual counseling sessions, provides more than 25,000 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 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: Strategic Management of the Member Services Bureau**

- A.1 Create methods to enhance and improve business processes resulting in greater efficiency in the delivery of benefit services.
- A.2 Develop, implement, and monitor plans affecting Bureau organization, staffing, workload, resource allocation, and budget to meet anticipated business needs on a short- and long-term basis.
- A.3 Incorporate new and existing technology to enhance the ability of the Bureau to meet increased workload demands with existing resources.
- A.4 Communicate strategic plans and initiatives effecting programs and processes in the Bureau.
- A.5 Support and coach supervisors through transition and adoption of automation efforts.
- A.6 Establish Bureau priorities and allocation of budget and staff resources. Conduct cost/benefit analyses of processes in the Bureau and implement changes to provide efficient use of resources.

**Position #300083**

**Trust Funds Director (Member Services Bureau Director)**

- A.7 Prepare regular and special reports on workload statistics for the Deputy Administrator, Division Administrator, and Executive Team.
- A.9 Develop operating and biennial budget proposals and other issue papers to request resources or suggest alternative approaches for delivery of services to participants.
- A.10 Evaluation of stakeholder readiness and performance gaps.
- A.11 Work closely with cross-functional teams to develop and implement change management plans to include communications, training, and coaching.
- A.12 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

**25% GOAL A: Management of the Member Services Bureau Operations**

- B.1 Direct the business operations of the Bureau of Member Services to maintain and enhance the quality and timeliness of services to members of the WRS.
- B.2 Develop and implement an internal control structure within the Bureau to assure that business processes are designed according to Departmental internal control standards.
- B.3 Continuously assess the quality of service delivery to WRS participants. Develop, implement, and monitor quality improvement strategies, initiatives, and projects.
- B.4 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.
- B.5 Manage all bureau technologies to enhance and maintain a “state of the art” customer service telephone management system.
- B.6 Incorporate new and existing technology to enhance the ability of the Bureau to meet increased workload demands with existing resources.
- B.7 Continuously identify business functions that can be automated and develop proposals to implement new automation. Conduct cost/benefit analyses of automation proposals.
- B.8 Develop Biennial Budget proposals that address resource needs of the Bureau and identify alternative approaches to address those resource needs.
- B.9 Direct 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.

**Position #300083**

**Trust Funds Director (Member Services Bureau Director)**

**15% GOAL C: Oversight of the Development of Program Policy**

- C.1 Serve as a member of the Division's Policy Committee to develop policy positions on all matters relating to WRS benefits. Provide advice to the Committee on operational issues relating to policy decisions.
- C.2 Provide direction and oversight to bureau staff regarding the development of program policy for the Bureau's programs.
- C.3 Maintain current knowledge in the program areas administered by the Bureau, keeping up to date on state and federal legislative and regulatory changes as well as professional research and literature.
- C.4 Identify program problems and policy questions and develop proposed resolutions. Coordinate implementation with other Bureaus in the Division and Department.
- C.4 Present program analysis and proposals for change in writing and in person to the Deputy Administrator, Administrator, the Secretary's Office, and the Boards.
- C.5 Draft legislation and administrative rules as necessary to carry out program goals.
- C.6 Research, analyze and oversee staff application of current state and federal laws and regulations affecting benefit programs and operations.
- C.7 Identify and advocate for policy changes to enhance customer service and simplify administration.
- C.8 Oversee the development and implantation of a comprehensive policy information and training system for counselors and phone center staff.
- C.9 Coordinate implementation of new laws, administrative rules and policies with other Bureaus or Divisions within ETF as necessary.

**20% GOAL D: Supervision of Assigned Bureau Staff**

- D.1 Provide supervision to assigned staff.
- D.2 Generally oversee the bureau's interview and selection process. Provide approval of hiring recommendations for Bureau vacancies.
- D.3 Manage employees' annual leave usage.
- D.4 Manage employee performance to include training, development, and evaluation. Review and provide approval of bureau's performance evaluations.

**Position #300083**

**Trust Funds Director (Member Services Bureau Director)**

- D.5 Establish work plans and priorities for bureau staff, evaluate performance, and take necessary and appropriate actions to maintain performance at acceptable levels. Ensure employee alignment to the agency competency framework.
- D.6 Assure adherence to Department and State personnel policies.
- D.7 Recommend and undertake disciplinary actions up to and including discharge when necessary.
- D.8 Create and maintain a positive work environment that promotes teamwork, enhances employee morale and ensures cooperative and effective working relationships with other ETF employees.
- D.9 Support and promote departmental policies and programs including Equity and Inclusion, Health and Safety, Employee Assistance, Family/Medical Leave, etc.
- D.10 Act in the place of the Deputy Division Administrator as directed during their absence or as assigned.

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**Position #300083**

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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. Skill in applying the principles and techniques of sound fiscal management.
18. Knowledge of fundamentals of accounting controls.
19. Ability to work in a rapidly changing and fast paced work environment.
20. Knowledge of business process automation.
21. Ability to understand and comply with all ETF and enterprise security standards, policies, and processes.