**POSITION #334864**

**Trust Funds Specialist - Advanced (Leadworker)**

**POSITION SUMMARY**

Under general supervision of the Retirement Planning and Outreach Section Supervisor, function as a lead worker in the Member Services Bureau within the Department of Employee Trust Funds. Complete research and analysis to determine resolution of highly technical questions and problems raised by benefit specialists, section supervisors, participants and other parties.

This position spends a significant amount of time serving as a subject matter expert on all plans and programs administered by the department and communicated via the bureau. This position will evaluate and manage the sections’ daily workload and workflow and assign work to staff, maintain appointment schedules, effectively handle priority requests and inquiries, and manage the lead worker shared mailbox. Collect, maintain, and report workload statistics to section supervisors and bureau director. Assess workflow and productivity and report findings along with recommended improvements/enhancements to section supervisors and bureau director. The position requires the ability to be organized and effectively manage and prioritize daily work. This professional-level position requires exceptional skills in oral and written communications, customer service, and interpersonal skills. Requires frequent use of computers, calculators and other communication tools along with maintain tools as benefit estimate processors and internet calculators. Provide back-up for customer service functions. Provide back-up for updating and maintaining the MSB’s numerous forms and brochures. As an employee of ETF, the incumbent will support and create a diverse and inclusive work force.

**GOALS AND WORKER ACTIVITIES**

30% GOAL A: Maintenance of internal and external communication tools and systems.

Worker

Activity A.1 Act as liaison between units, sections and bureaus to ensure smooth and effective internal communications.

A.2 Represent the bureau and participate on various teams, projects and committees to assess and recommend improvements.

A.3 Represent the bureau in absence of supervisors (e.g. meetings, problem folders, irate callers, etc.).

A.4 Serve as a subject matter expert for inquiries from auditors and other outside agency staff.

A.5 Keep staff informed timely of new or changing laws, policies or procedures affecting WRS retirement, disability and insurance programs.

A.6 Serve as a back-up contact for all review and revisions of the Bureau’s forms and brochures as necessary to incorporate new legislation, administrative rules, regulations, and department policies. Quality and accuracy must meet ETF’s expectations.

25% GOAL B: Provision of research, analysis and resolution of highly technical questions and problems relative to Wisconsin Retirement System (WRS) retirement, disability, and insurance programs.

Worker

Activity B.1 Research and correctly interpret/apply provisions of Wisconsin

Statutes, Administrative Code, federal laws and regulations, and departmental policies to assure compliance when seeking resolution of exceptional, non-routine, or complex benefit questions from staff, section supervisors, bureau directors, administrators, other department staff, participants, legislators and other interested parties.

B.2 Advise specialists on appropriate responses to highly technical and non-routine questions that arise in daily operations.

B.3 Solicit input from other department staff and/or program/policy experts when necessary to clarify or correctly interpret policies, provisions or requirements.

B.4 Assist staff with performing benefits calculations to assure legal compliance and actuarial soundness.

B.5 Assist specialists in documenting unresolved issues or problems. Perform assessment and recommend solutions to section supervisors or bureau director.

B.6 Investigate and respond to high priority requests, inquiries or problems on behalf of supervisors, bureau director, division administrator or the secretary's office.

B.7 Evaluate and recommend revisions to statutes, administrative rules, and department policies as appropriate to improve/enhance the equitable and effective administration of benefit programs.

B.8 Audit completed jobs as assigned for the purpose of identifying potential process problems, training needs including virtual, face to face appointments and outreach events.

20% GOAL C: Maintenance of retirement benefit estimate processors and Internet benefit calculators.

Worker

Activity C.1 Make changes timely, accurately and arrange all testing.

C.2 Identify and prioritize program corrections and enhancements.

C. 3 Maintain WEBS program log.

C. 4 Develop test plans, complete user testing, communicate any program problems and issues with programmers.

C. 5 Prep and submit project requests pertaining to MSB’s owned programs.

15% GOAL D: Management of daily workload and workflow

Worker

Activity D.1 Assign and reassign work to staff taking into consideration field

presentations, assignments, leave time, and other scheduling conflicts.

D.2 Prepare weekly staff work schedules.

D.3 Update and maintain work statistics and produce reports for review by the supervisors.

D.4 Analyze workflow to identify problems and recommend solutions to the supervisors.

D.5 Identify backlogs, bottlenecks, and other hindrances to productivity. Recommend/implement corrective measures.

D.6 Make recommendations to supervisors, trainers or others on process or procedural changes to comply with pending or enacted legislation.

D.7 Provide input to supervisors and bureau director for development of bureau objectives, work plans, budget initiatives, policies and procedures.

D.8 Assist supervisors in preparation for staff meetings.

D.9 Identify critical requests or inquiries for priority assignment to staff.

D.10 Identify and route correspondence/inquiries to other department areas for handling as necessary.

D.11 Assign correspondence to staff for appropriate action.

10% GOAL E: Provision of back-up for customer service functions and training.

Worker

Activity E.1 Communicate benefit information thoroughly and effectively to

participants and other interested parties via face-to-face meetings, telephone conversations and in writing.

E.2 Perform other customer service back-up functions as assigned by supervisor.

E.3 Review customer services for efficiency and completeness and recommend revisions to supervisor.

E.4 Assist as required with the training of new and established staff.

(Rev. 12/21)

**KNOWLEDGE, SKILLS, ABILITIES**

1. Knowledge of organizational/time management techniques.
2. Knowledge of methods and techniques for managing and resolving conflicts.
3. Knowledge of ETF, related benefit programs along with state and federal tax laws, Wisconsin statues, administrative rules, and contracts and policies relating to benefit payment programs.
4. Knowledge of effective customer service methods and techniques.
5. Knowledge of techniques/methods for gathering statistics and preparing reports.
6. Knowledge of standards and protocol for writing procedures.
7. Knowledge of adult training tools, needs assessment development, along with knowledge transfer/sharing methods and techniques and evaluation results of trainings.
8. Knowledge of automated systems used in processing benefits or other technical programs.
9. Effective team building skills to develop and sustain effective working relationships.
10. Highly developed oral and written communication skills.
11. Ability to prioritize work to meet deadlines or unanticipated needs or priorities.
12. Ability to analyze facts and problems, infer and decide on potential and appropriate solutions, exercise considerable independent judgment.
13. Ability to research various resources in order to analyze information and determine appropriate responses to complicated or technical questions.
14. Ability to perform a sequence of mathematical calculations.
15. Ability to establish positive, productive, and efficient working relationships with a variety of persons at different levels within and outside the organization.
16. Ability to oversee and audit work of unit employees engaged in particularly difficult work situations such as providing constructive feedback.
17. Ability to facilitate difficult and sensitive employee and customer interactions.
18. Ability to understand and develop departmental standards for forms design.
19. Ability to use personal computer-based software systems (e.g., Microsoft Windows applications such as Word, Excel, Access, etc.).
20. Ability to effectively and professionally communicate technical and complicated information to customers/members.
21. Ability to work effectively in a team environment.
22. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures.