

MSB Trust Funds Supervisor

Position #332209

Page 1

POSITION SUMMARY

Under the general supervision of the Member Services Bureau Director, the Trust Funds Supervisor is responsible for directing a Retirement Planning & Outreach Section in providing accurate and timely benefit information, education, and information to Wisconsin Retirement System (WRS) members. Benefit plans administered by the Department include retirement, disability, survivor, and separation benefits, as well as group health, group life, and disability insurance programs. Staff in the Retirement Planning & Outreach Section are responsible for responding to written and telephone inquiries, individual member counseling, and preparation and explanation of benefit estimates and other WRS account information. Services also include development and delivery of mass communications such as public and private presentations, webinars, e-learnings, website postings, and more.

This position will manage staff workload and workflow to assure quality and effectiveness of operations and services as well as provide direction to staff on the interpretation, application, and implementation of existing and changing laws, rules, and policies governing WRS benefit programs. This position has primary responsibility of ensuring the agency's front desk is resourced by qualified, knowledgeable staff who uphold the agency's mission, vision, and values.

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 & WORKER ACTIVITIES

20%	GOAL A: Management of Workload and Workflow
Worker	
Activity	<p>A.1 Manage Section workload and workflow to enhance and maintain quality and timeliness of customer services provided.</p> <p>A.2 Evaluate Department's customer service needs and assist Bureau Director in developing short-range and long-range service goals and objectives for Bureau. Implement and monitor quality improvement strategies, initiatives, and projects.</p> <p>A.3 Develop and implement work and staffing plans that effectively and efficiently balance demands for customer service coverage during established office hours against the other demands such as deskwork, special and ongoing projects, and requests for leave or flexible scheduling.</p> <p>A.4 Analyze workload to identify accomplishments, backlogs, bottlenecks, and other hindrances to productivity and customer service quality. Recommend and implement short-term and long-term corrective measures.</p> <p>A.5 Develop and implement plans for Section organization, staffing allocation, temporary staffing, workload shifting, automation, and cross training that effectively meet current and future workload changes.</p> <p>A.6 Effectively manage funds allocated for overtime and extra hours to ensure maximum benefit and productivity.</p>

- A.7 Identify and recommend changes to improve operational efficiency and effectiveness.
- A.8 Assess Section needs for staffing and other resources. Develop budget proposals with appropriate justification for Bureau Director to secure required resources.

35% GOAL B: Direction of Member Services and Communications.

Worker

Activity

- B.1 Direct staff in effectively offering complete, accurate, and timely information to educate customers and help them take full, legal advantage of their available WRS benefits and to adequately prepare for significant life events such as termination, retirement, disability or death.
- B.2 Direct staff in the accurate interpretation and application of laws, rules and policies governing highly complex WRS programs, benefit rights, and entitlements.
- B.3 Direct staff in providing timely, complete, and accurate responses to member's requests for information. Requests include activities like calculating and creating benefit estimates, applications, account balance statements, service purchase cost estimates, account divisions per Qualified Domestic Relations Orders, and general written responses to complex questions or other member-specific WRS information.
- B.4 Direct staff in providing statewide benefit presentations public and private audiences for large and small groups. Develop presentation schedules timely, accurately, and based on demand, and make effective and efficient use of available resources.
- B.5 Direct the ongoing review, maintenance, and enhancement presentations, and supporting materials, and delivery methods, including use of current, new and changing technology.
- B.6 Ensure staff are adequately and effectively trained on public speaking and the use of needed media, equipment, software, and technology
- B.7 Direct staff in providing high quality, efficient service, and accurate information to members in one-on-one, small group, and virtual meetings with customers. Follow best practices for delivery methods such as webinars, virtual meeting, and others.
- B.8 Direct front desk and quick service staff in promptly and courteously greeting and assisting walk-in customers. Ensure that the staff consistently reflect a helpful and friendly demeanor and meet standards for quality customer service.
- B.9 Serve in a backup capacity to direct the training and training development efforts of the bureaus training staff and staff who support training efforts. Ensure training is high quality, that training needs are identified and met, that adult learning principals are applied, and by eliminating barriers to progress for both trainers, trainees, and auditors. Monitor results, evaluate progress, and adjust approaches when warranted.

- B.10 Serve in a backup capacity to direct the development the bureau's benefit communications such as publications, forms, brochures, form letters, informational mailers, internet postings, e-news, and other agency media. Ensure material is of a high quality, clear, concise, consistent and developed in an efficient and effective manner.
- B.11 Serve in a backup capacity to direct the bureau's cross-trained specialists who assist the department's full time member call center during periods of need such as peak call volume periods. Ensure staff receives needed additional training, that telephony hardware and software are setup and maintained, and that phone coverage schedules balance workload demands while contributing effectively when needs arise.
- B.12 Investigate and provide oral/written responses to more complicated requests and inquiries. Research and draft departmental determination letters for Bureau Director's signature.

10% GOAL C: Implementation of new laws, rules, regulations, policies and/or program changes impacting WRS benefits.

Worker
Activity

- C.1 Research, analyze, and interpret new or changing laws, rules, regulations or policies governing WRS benefit programs and determine impact on Section operations and functions.
- C.2 Identify issues, problems, inconsistencies, or contradictions that require clarification and resolution. Communicate assessments and recommendations to the Bureau Director.
- C.3 In coordination with other sections, bureaus and divisions, develop implementation plans and timetables. Identify Section's role in implementation including critical tasks and assignments.
- C.4 Assess Section needs for staffing and other resources to timely and effectively implement changes. Communicate appropriate justifications to the Bureau Director.
- C.5 Direct the development of new and/or revised work instructions and procedures needed to implement changes.
- C.6 Identify, plan, and direct training of staff that is necessary to implement changes.
- C.7 Ensure that business needs are adequately identified, communicated, evaluated, monitored, tested and implemented
- C.8 Direct efforts to efficiently and effectively identify and revise communications such as forms, brochures, letters, presentations, webinars, and more that are affected by the law change.

MSB Trust Funds Supervisor

Position #332209

Page 2

- 30%** **GOAL D: Supervision of Staff**
Worker
Activity
- D.1 Develop and update employee position descriptions. Evaluate and prepare written justification for reclassifications or reallocations as appropriate.
 - D.2 Establish employee performance standards; monitor on-going compliance and conduct annual evaluations. Recommend and institute performance improvement initiatives and corrective actions.
 - D.3 Assign work and monitor progress, establish timelines and set goals.
 - D.4 Manage and maintain leave accounting reporting and vacation schedules.
 - D.5 Enforce agency work rules. Recommend and carryout disciplinary actions up to and including discharge. Investigate and attempt to resolve work-related complaints and grievances.
 - D.6 Develop recruitment plans, interview candidates and make recommendation on hiring of permanent, project, limited term (LTE) and contract employees to the Bureau Director.
 - D.7 Create and maintain a positive work environment that promotes continual learning, teamwork, enhances employee morale and ensures cooperative and effective working relationships with other ETF employees.
 - D.8 Support and promote departmental policies and programs including Equity & Inclusion, Health & Safety, Employee Assistance, Family/Medical Leave, etc.
- 5%** **GOAL E: Provision of program and policy support to Bureau Director and Division Administrator.**
Worker
Activity
- E.1 Provide accurate and detailed information to legislators, attorneys, auditors, third-party contractors, and employers within confidentiality guidelines.
 - E.2 Evaluate, recommend, and implement new technologies to improve the efficiency and effectiveness of operations and customer service.
 - E.3 Direct and/or serve on work groups, project teams and committees. Perform other special assignments as directed by Bureau Director.

MSB Trust Funds Supervisor

Position #332209

Page 2

KNOWLEDGE, SKILLS, AND ABILITIES:

1. Knowledge of the principles and practices of employee benefit plan administration and operations.
2. Knowledge of State and federal laws, rules and regulations governing benefit programs.
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. Knowledge of supervisory principles and procedures
7. Knowledge of personnel management principles, techniques, and procedures, including methods to assess staff capabilities.
8. Knowledge of staff development and adult training methodologies and techniques.
9. Experience applying conflict resolution methods and techniques.
10. Knowledge of motivational techniques.
11. Ability to set short- and long-term goals
12. Knowledge of project management methods and techniques
13. Knowledge of data gathering and statistical analysis techniques.
14. Analytical and problem solving skills.
15. Knowledge of policy analysis and development methods and techniques
16. Knowledge of strategic planning techniques.
17. Organizational skills
18. Ability to handle multiple priorities simultaneously.
19. Effective public relations and customer service skills and techniques.
20. Knowledge of principles of information system technology.
21. Ability to work in a rapidly changing and fast paced work environment.
22. Knowledge of equity & inclusion, employee health and safety, employee assistance, and FMLA policies and procedures.
23. Ability to understand and comply with all ETF and enterprise security standards, policies, and processes.