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| **Appendix 7 - JOB CATEGORIES AND POSITIONS** |
| **Specific hourly rates for a Job Category should NOT be included in your response to Appendix 7. Rather, include them in Appendix 8 - Cost Proposal. Historical rates are given only for reference purposes.**  |
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|  | Indicates a category description used by different work units. |
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| POSITION7.1 Accountant (current contractor pay range $35 to $45 per hour)3 positions filled | DESCRIPTION |
| **Job Category Descriptions – includes average pay range and historical positions filled from the beginning of the contract, May 2016, to Feb 2020.** |
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| Accountant | Position Summary: You will perform accounting functions to accurately maintain financial accounts for the complex benefit programs that ETF administers. You will be responsible for analyzing, adjusting, and reconciling accounts as well as preparing and auditing vouchers, journal entries and adjustments. This position is an integral member of the fiscal team that ensures the accuracy of member account transactions to provide the highest level of fiscal integrity for both the members and employers we serve. In addition, you will assist with system maintenance and recommend system and process enhancements that will help our agency process transactions more effectively.  |
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| Qualifications: Minimally qualified candidates will have experience with the following items: * Bachelor's degree or higher in Accounting or an equivalent combination of education and/or professional accounting experience (e.g. analysis of financial statements/reports, balance sheets, auditing, fund or cost accounting, etc.).
* Assist in the maintenance or analysis of financial records.
* Interpret and analyze financial data.
* Design, test, implement and maintain automated and/or manual financial systems.
* Establish and maintain financial journals, accounts, ledgers and records within an automated financial system.
* Allocate revenues and expenses among funds.
* Reconcile accounts on a periodic basis to other accounting systems and reviewing other staff output.
* Prepare financial statements, reports or other financial documents.
* Maintain and reconcile fixed assets or inventory records.
* Skill in applying Generally Accepted Accounting Principles (GAAP).
* Prepare schedules, tables, graphs and other exhibits for interim and final audit reports.
* Advise management on methods to improve accounting or other operational procedures.
* Communicate fiscal issues effectively with division/program staff.
* Develop ad hoc fiscal reports to meet user needs.
* Knowledge in governmental and fund accounting.
* Analysis and reconciliation skills.
* Knowledge of PC-based spreadsheet and database applications and word processing software.
* Knowledge of accounting or ERP systems, preferably PeopleSoft.
* Problem solving techniques.
* Good written and oral communication skills.
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| Budget, Contract Administration and Procurement (BCAP) | What we are looking for: The Bureau of Budget, Contract Administration and Procurement (BCAP) is looking for an analytical and motivated accountant to support ETF employees and their vendors. We're looking for someone who pays attention to the details, is a clear communicator, both verbally and in writing, and looks for ways to improve processes and procedures without compromising quality. |
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| Department of Trust Finance (DTF) | What we are looking for: The Department of Trust Finance is looking for an analytical and motivated accountant to support the WRS and related programs. They pay attention to details, are a clear communicator, both verbally and in writing, and look for ways to improve processes and procedures without compromising quality. They want to ensure financial transactions are completed and recorded correctly through the entirety of their lifecycle. |
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| 7.2 Benefit Specialist/Benefit Assistant (current contractor pay range $28 to $34 per hour)34 positions filled |
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| Benefit Specialist-Benefit Assistant | Position Summary: As a Benefit Specialist, you'll work directly with retirees, members, and employers to research, answer, and resolve complicated questions and problems relating to ETF's benefit programs (health, life, disability and ICI) and retirement programs. You'll use the knowledge you learn through training to thoroughly explain available benefit programs, options, eligibility requirements, and application deadlines to participating employers and members. You will need to provide the information in an easy to understand format so members can make informed decisions. You may also be responsible for monitoring and updating changes to health insurance benefits, including changing how a retiree's health insurance premiums are paid, assisting employers with benefit adjustments and adjusting members’ monthly payments as needed. The work you do will ensure that State and Local government employees and retirees have the insurance coverages they need when they need them, and that retirees' monthly payments are made timely and accurately. There are a lot of deadlines and your attention to detail will be key, but you'll have a lot of opportunities to feel accomplished in meeting those requirements. |
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| Qualifications: Minimally qualified candidates will have experience with the following items: * Analyze records to determine eligibility for benefits.
* Ability to understand and communicate complex information.
* Calculate estimated and final benefit amounts.
* Provide complex and detailed benefit information.
* Effectively communicating benefit options.
* Effective customer service techniques.
* Research, interpret and apply relevant WI Statutes, Admin Code, and Department policies and procedures that pertain to ETF-administered programs.
* Participate and provide input regarding benefit policy and administrative rules.
* Obtain relevant information without disclosing confidential information.
* Apply state and federal tax laws and regulations pertaining to available benefits.
* Ability to interact positively with a variety of persons at different levels within and outside the organization.
* Ability to use complex and sophisticated personal computer-based software systems (e.g., Microsoft Windows applications such as Word, Excel, Access, etc.)
* Ability to use complex case management, customer relationship management, and benefit processing software.
* Excellent written, oral and interpersonal skills required.
* Good phone presence.
* Must develop in-depth knowledge of the Wisconsin Statutes and Administrative Codes relating to the benefits administered by Employee Trust Funds.
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| Employer Services (WRS Unit/Insurance Unit) | What we are looking for: The Employer Services Insurance Unit is seeking a reliable and energetic customer service representative to assist our retirees and members with questions about their insurance benefits. We're looking for someone who is ready to learn as much as they can about our benefit and insurance programs. (Don't worry, we'll teach you everything you need to know). They love to interact with people and are comfortable managing competing priorities in a fast-paced environment.Additional Skills/Knowledge requested for this position: Background in insurance would be helpful. |
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| Contact Management Section (Call Center) | What we are looking for: The Contact Management Section is seeking a reliable call center representative to provide information and answer the questions for our members regarding their benefits. We're looking for someone who will take ownership for each member interaction, can anticipate our members' needs and exceed their expectations, and someone who views change as an essential function of growth.Additional Skills/Knowledge requested for this position: Previous call center experience would be helpful. |
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| Member Services (Quick service and Outreach) | What we are looking for: The Member Services area is seeking customer service-oriented individuals with experience communicating technical information via face-to-face meetings, phone and in writing. If you dream of a career that would allow you to make a difference, consider this position in which you will provide important information to our customers that will enable them to make informed decisions about their retirement and other benefits! Additional Skills/Knowledge requested for this position: Previous customer service experience would be helpful.  |
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| Benefit Initiation  | What we are looking for: The Benefit Initiation Section is seeking reliable customer service representatives to review and process member benefit applications, and determine if a member or their beneficiary is eligible for a benefit. We're looking for people who are self-motivated, want to collaborate and engage with their coworkers and our members, and are comfortable managing competing priorities in a fast-paced environment. Additional Skills/Knowledge requested for this position: Previous experience in customer service and benefit calculations would be helpful.  |
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| 7.3 Long–Term\* Assistant (current contractor pay range $22 to $40 per hour)14 positions filled\*for more than 12 months |
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| Long–Term Assistant | Position Summary: The Department administers numerous benefit programs for current, inactive, and retired public employees. The benefit programs include the Wisconsin Retirement System, group health insurance, group life insurance, deferred compensation, employee reimbursement account, income continuation insurance, long-term disability insurance, duty disability, and long-term care insurance. This position would be responsible for providing program support to administrators and office directors and providing agency-wide administrative services.  |
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| Qualifications:An exceptional candidate will be able to effectively prioritize their workload and make independent decisions after initial training. This position functions as a member of the agency’s various teams and requires judgment, initiative, discretion and problem-solving ability. Other qualifications include:* Excellent interpersonal skills and customer service techniques.
* Effective time management, priority setting techniques for managing workload.
* Attention to detail.
* Clear and effective oral and written communication skills.
* Ability to develop and maintain effective working relationships with persons at various levels.
* Knowledge of research methods and record keeping techniques.
* Knowledge of shipping techniques, resources, and procedures and ability to operate mail and office related equipment.
* Excellent skill and knowledge in accurate data entry and quality review of data in creating and updating records.
* Problem solving analysis and research skills, ability to determine potential solutions and develop recommendations.
* Skill and knowledge of the uses and applications of computer programs and data entry including mail-related software and Microsoft Office suite products such as Word, Excel, Access, and Outlook.
* Knowledge of the uses of scanning equipment and ability to learn imaging and workflow software.
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| Records Management Section | What we are looking for: The Records Unit is seeking a candidate with exceptional skills in accurate online entry; research and analysis; oral communication, and customer service. This position requires periodic bending, stooping, and lifting of boxes that weigh approximately 30-35 pounds.   |
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| Supply and Mail Room Section (SAMS) | What we are looking for:The Supply and Mail Services (SAMS) Unit is seeking a candidate with exceptional skills in customer service and researching information. This position requires extreme accuracy and timeliness. A participant’s benefit eligibility and amount, a beneficiary’s eligibility for survivor benefits, and interest penalties charged to employers are all determined by timely and accurate receipt, filing, and processing of required forms and information. This position requires regular walking, standing, bending and daily lifting of mail totes, boxes of reports, copy paper, forms, and UPS and Fed Express deliveries.   |
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| Human Resources Section | What we are looking for:The Human Resources Section is seeking a candidate with exceptional skills in customer service and organization. This position will be responsible for coordination of interviews and drafting some HR correspondence as well as other support activities of the HR and Payroll team. This position will also be responsible for data entry and filing related to HR and payroll functions. This position will coordinate and send out all staff announcements regarding personnel changes and additions. This position will be expected to provide customer service to staff as needed.  |
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| Publications and Communications Specialist | What we are looking for:The communications department or member services is seeking a candidate that will coordinate the development of print and electronic publications (e.g., newsletters, brochures) and other communications intended for agency staff, members, employers, boards, state government, and the public. |
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| Library Assistant | What we are looking for: The Division of Management Services is seeking a candidate with knowledge and experience with information management techniques, practices and tools. This position will also provide expertise for the creation and upkeep of ETF’s knowledge bases and connect ETF staff with the best resources and provide formal training when needed on information usage, research techniques and practices. This position is also responsible for the support and improvement of the ETF taxonomy, it’s integration to enterprise search tools, and the training and support of staff in the use of the taxonomy.  |
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| Executive Staff Assistant – Board Liaison | What we are looking for:The Executive Staff Assistant Team is seeking a candidate with a strong background as an administrative assistant to work in assisting as a board liaison. The position has extensive contact with public officials (Governor’s office, legislators, board members, ETF management staff, and other agency officials) and requires an understanding of roles, responsibilities and programs throughout ETF in order to respond to complex and technical questions and take minutes of meetings where complex, technical, and sensitive information is discussed. This position also functions as the backup to ETF’s other board liaison.  |
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| 7.4 Long – Term\* Professional (current contractor pay range $40 to $55)9 positions filled\*for more than 12 months |
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| Long – Term Professional | Position Summary: The Department administers numerous benefit programs for current, inactive, and retired public employees. The benefit programs include the Wisconsin Retirement System, group health insurance, group life insurance, deferred compensation, employee reimbursement account, income continuation insurance, long-term disability insurance, duty disability, and long-term care insurance. This position would be responsible for providing program support to administrators and office directors and providing agency-wide professional services.  |
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| Qualifications:An exceptional candidate will be able to effectively prioritize their workload and make independent decisions after initial training. This position functions as a member of the agency’s various teams and requires judgment, initiative, discretion and problem-solving ability. Other qualifications include:

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| * Considerable skill in organization and management principles, practices and procedures.
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| * Considerable ability to organize and plan complex projects and multi-dimensional tasks.
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| * Considerable knowledge of the principles of development, management and evaluation.
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| * Strong oral and written communication skills.
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| * Ability to direct appropriate flow of information and presentation of new ideas and concepts.
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| * Ability to explain complex program components and/or requirements to individuals or groups consisting of people of varying expertise.
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| * Ability to summarize and explain complex information clearly and concisely.
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| * Considerable skill in writing technical, management and analysis reports and papers.
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| * Ability to prepare statistical reports, including creating and constructing graphs, charts, and tables.
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| * Knowledge of methods to effectively display data for use by others in making management decisions.
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| * Considerable knowledge of computer applications, software and communication devices.
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| * Skill in manipulating automated databases using spreadsheet and relational database software.
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| * Considerable ability to work effectively in team environments, building consensus and securing cooperation and agreements in situations where conflicting objectives exist.
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| * Extensive knowledge of group facilitation methods and techniques and the principles of effective meetings.
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| * Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.
* Knowledge of adult training methods and techniques.
* Leadership skills.
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| Budget Analyst – (BCAP) | What we are looking for:The Bureau of Budget, Contract Administration and Procurement (BCAP) seeks individuals who will be directly responsible for the implementation, monitoring and control of the agency’s biennial and annual operating budgets. |
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| Executive Staff Assistant – ETF General Counsel | What we are looking forThe Executive Staff Assistant Team seeks candidates with a strong background as an administrative assistant to work in assisting ETF’s General Counsel and other attorneys in the delivery of legal services for the agency. Prior work experience as a Paralegal is preferred but not required.  |
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| Purchasing and Contracts Specialist – (BCAP) | What we are looking for:The Bureau of Budget, Contract Administration and Procurement (BCAP) seeks candidates to play a key role in ensuring that adequate contracts are in place for ETF to effectively administer the retirement, insurance and other benefit programs for 600,000+ state and local government employees and retirees of the Wisconsin Retirement System (WRS) and their families.  |
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| Program and Policy Analyst | What we are looking for:The Secretary’s Office or other Department seeks a Program and Policy Analyst. You will be an advocate for participants, assuring quality of service and resolving participant’s complaints, or you will be working as the principal policy advisor to management on issues related to public employee benefit plans. This position involves research and analyzing policy issues for the retirement and insurance programs administered by the Department of Employee Trust Funds (ETF). Or you may be working directly with other offices regarding other programs or policies. |
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| Training Officer/Coordinator | What we are looking for:The Human Resources Team is looking for a professional to develop, promote, conduct, implement and/or coordinate training for staff and/or employers.  |
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| Auditor (Internal) | What we are looking for:The Office of Internal Audit is looking for a professional to perform auditing duties requiring the knowledge and application of accounting and auditing theories and principles. The nature and complexity of these duties will be commensurate with the job.  |
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| 7.5 Other Positions as Needed |
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| Other Positions as Needed | Position Summary: The Position Request will specify a position description for Other Positions as Needed. ETF has Other Positions as Needed so that ETF has maximum flexibility to structure new positions to retain qualified candidates, both for positions ETF anticipates needing and for positions ETF cannot anticipate needing. |
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| Qualifications:The Position Request will list what duties and skills are required.  |