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| **Appendix 7 - JOB CATEGORIES AND POSITIONS** |
| **Instructions:** 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. On pg. 17, you’ll find a spot for a Proposer Response to Each Job Category. For every Job Category you have committed to covering in Appendix 6.10, provide a written response that shows your understanding of the Job Category, your experience filling similar positions, how that experience is relevant, and evidence of your firm’s ability to supply personnel with the skills, abilities, and knowledge required to perform that Job Category’s duties and responsibilities. For 7.5 Other Positions as Needed, if you are covering this Job Category, explain how you will rise to the occasion of sourcing any kind of position necessary to meet ETF’s mission and needs.  |
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|  | Indicates a category description used by different work units. |
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| JOB CATEGORY / POSITION7.1 Accountant (Journey, Senior or Advanced)(current contractor pay range $47 to $75 per hour)9 positions filled | DESCRIPTION and REQUIREMENTS |
| **Job Category Descriptions – includes average pay range and historical positions filled from Oct 29, 2020 – December 31, 2024.** |
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| Accountant | Position Summary:  This position will work under general supervision and be responsible for performing advanced accounting functions for the Wisconsin Retirement System (WRS) as well as other employee benefit plans administered by the Employee Trust Fund. This position is responsible for independently performing complex financial calculations, reconciliations, and financial analysis as well as completing journal entries and other accounting functions in accordance with GAAP. This position will audit vouchers and journal entries related to annuity payments and allocations as well as perform and review member account adjustments following ETF policies and state statute. This position is also actively involved in the analysis, development, and implementation of procedures to ensure the most efficient and effective implementation of work plans and/or procedures. |
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| Qualifications: Minimum qualified candidates will have experience with the following items: * Bachelor's degree or higher in accounting.

At least two - five years of equivalent work-related experience (in transactional accounting).* Ability to research, analyze and determine responses to complex questions and problems.
* Ability to interpret and analyze financial data, prepare financial statements, reports, or other financial documents.
* Ability to reconcile accounts on a periodic basis to other accounting systems.
* Ability to develop financial policies and procedures.
* Strong critical thinking, analytical and data gathering skills.
* Strong knowledge of the principles of internal control.
* Knowledge of Generally Accepted Accounting Principles (GAAP) applicable to governments.
* Experience using Microsoft Office products and database applications.
* Knowledge of accounting or ERP systems, preferably PeopleSoft.
* Effective organizational, time management and detail-oriented skills
* Effective written and oral communication skills.

Ability to successfully work in a team environment |
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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:  ETF’s Division of Trust Finance is looking for an analytical and motivated accountant interested in transactional accounting and financial reporting. We are looking for someone who is detail oriented, eager to learn about complex benefit programs, and interested in helping the team ensure proper and timely reporting. We want someone who is skilled at diving into complex issues and proposing effective solutions. |
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| 7.2 Benefit Specialist (current contractor pay range $30 to $38 per hour)56 positions filled |
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| Benefit Specialist | Position Summary: If client facing (Member/Benefit/Employer Services Bureau):  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.If a support role/various responsibility:As a Benefit Specialist, you will support operational staff and managers in member and/or employer services related to the administration of ETF’s public employee benefit programs. You will need to learn complex benefit program requirements for eligibility, enrollment, benefit application and distribution processes. You will work with highly complex and sensitive data related to member demographics and benefit accounts and be responsible for updating changes. You will need to provide complex information in easy-to-understand formats for various audiences. Immediate assignments will be focused on supporting benefits administration technology modernization projects with research and remediation of data issues during conversions. At times, you may be assigned daily operational tasks such as processing retirement benefit estimates or taking calls in the member contact center and/or other special projects such as locating lost members or supporting targeted outreach efforts for customer experience improvements. |
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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.
* 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.
* 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 in the Employer Services Bureau 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 administration would be helpful. |
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| Member Call Center | What we are looking for:  The Member Call Center in the Member Services Bureau 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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| Retirement Planning | What we are looking for:  The Retirement Planning Section in the Member Services Bureau 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 in the Benefit Services Bureau 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 $25 to $35 per hour)19 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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| Supply and Mail Room Section (SAMS)Includes Records  | 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

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 | Qualifications: Minimally qualified applicants will have training and/or experience in the following areas:* Providing administrative support (creating spreadsheets, scheduling, maintaining files and/or records, corresponding with customers, creating memos, etc.)
* Utilizing various computer software programs such as Microsoft Office Suite (Outlook, Word, Excel, etc.)
* Interpreting rules, statutes, policies, and/or procedures
* Working with confidential information (e.g., healthcare information, financial information, employee information, volunteer information, etc.)
* Performing detail-oriented tasks (e.g., data entry, proofreading documents, checking records or reports for accuracy and/or completion, etc.)

In addition, a well-qualified applicant will have training and/or experience in the following areas: * Interpreting and applying human resources rules, regulations, and/or policies.
* Performing recruitment and selection activities (e.g. coordinating interviews, running background checks, and/or processing hiring documents)
* Working with a Human Resources Information System (e.g. PeopleSoft, Kronos, Taleo, etc.)
* Training, certification, or degree in human resources or a related field

What we are looking for:The Department of Employee Trust Funds is seeking a talented individual to provide human resources support to the Office of Talent Management. Duties and responsibilities include coordinating candidate interviews, processing background checks, drafting and editing personnel documents and letters, entering data into the human resources information system (HRIS), and assisting professional human resources staff. This position functions as a member of the agency’s Human Resources Team and requires judgment, initiative, discretion, and problem-solving ability. Candidates must be able to establish and maintain effective professional relationships as well as maintain confidentiality of sensitive information with tact and discretion. Candidate must also be able to effectively prioritize their workload and make independent decisions after initial training.This assistance will be necessary to allow the permanent members of the HR team to dedicate time to the professional level responsibilities required with staffing, classification, employment relations and affirmative action. |
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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. Additional Skills/Knowledge requested for this position: Knowledge or experience running meetings or board functions is a plus.  |
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| 7.4 Long – Term\* Professional (current contractor pay range $42 to $72)7 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 and their beneficiaries. 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 will be responsible for developing detailed worker procedures documentation for changed business processes resulting from technology modernization and other changes, updating instructional manuals and informational brochures in plain language.  |
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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.

Long – Term Professional, cont.  |
| * 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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| Technical Writer (Detailed Procedures Documentation) | Qualifications: An acceptable candidate will have extensive experience writing technical policies and procedures and translating complex information into plain language in the insurance or other employee benefits administration field or a related area.  Candidates must be able to collaborate with varying audiences and work independently to effectively prioritize and manage completion of their workload.  The work requires judgment, initiative, and problem-solving ability.  Other specific qualifications include:* + Ability to develop text and visual representations for large volumes of complex procedure documents meeting organizational standards.
	+ Experience writing user-friendly content that meets the needs of the target audience.
	+ Experience maintaining and updating technical documents.
	+ Experience creating content to educate and instruct an audience with varying levels of baseline knowledge about a complex subject.
	+ Experience curating and organizing information into reference documents.
	+ Ability to evaluate current content and identify opportunities for process and procedure improvements.

What we are looking for: Someone with 5 years or more experience in the insurance and other employee benefits administration field or a related area.  The individual will perform a variety of tasks in collaborating with a variety of subject matter experts to gather information, reviewing screens and process and data flows in multiple technology tools, and work independently to develop effective detailed worker procedures and instructional materials such as manuals and informational brochures in plain language.  Required Skills* Bachelor’s degree or comparable professional experience in insurance and other employee benefits administration or related field
* 5 or more years of experience as an effective technical writer, including writing documentation and procedural materials for multiple audiences

Preferred Skills* Superior written and verbal communication skills, with a keen eye for detail
* Proven ability to handle multiple projects simultaneously, with an eye for prioritization
* Self-motivated, self-disciplined, and able to work with minimal supervision
* Quickly learn and understand complex topics and make them easily understandable in text, graphs or diagrams, and pictures.
* Ability to review and/or copy edit content developed by others and work collaboratively with cross-functional teams.

Please include in candidate submittals:At least one writing sample or other work products sample (max of three samples). |
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| Communications Assistant | 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:* Ability to develop written and visual communication collateral that meets organizational standards
* Obtain a deep understanding of health insurance benefits, especially annual changes related to the open enrollment period
* Write user-friendly content that meets the needs of the target audience
* Help maintain health insurance benefits webpages
* Evaluate current content and identify opportunities for improvement

Daily and Monthly Responsibilities include:* Serve as a key content development team member for annual open enrollment period communications, publications, and trainings
* Assist with content and resource management for health benefits website
* Support health insurance program initiatives, including creation of video scripts, web page content drafting, newsletter content, and other educational materials
* Review and copyedit policy memorandums and/or presentations as needed/assigned
* Manage regular external health plan communications and contact lists
* Update forms, publications, and manuals as needed/assigned
* Prepare and execute communications plans as needed/assigned

What we are looking for:Required Skills* Bachelor’s degree or comparable professional experience in relevant field
* 2 to 5 years of experience as an effective technical writer, including writing documentation and procedural materials for multiple audiences
* 1 or more years of experience with database entry and/or content management system

Preferred Skills* Superior written and verbal communication skills, with a keen eye for detail
* Proven ability to handle multiple projects simultaneously, with an eye for prioritization
* Self-motivated, self-disciplined, and able to work with minimal supervision
* Quickly learn and understand complex topics and make them easily understandable in text and pictures
* Ability to review and/or copyedit content developed by other members of the team and work collaboratively with cross-functional teams
* Strong working knowledge of Microsoft Office
* Comfort working in a hybrid environment (remote and in-office work)
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| Executive Staff Assistant – Paralegal | 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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| Benefits 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 & Development/eLearning Specialist | Required skills:The ideal candidate will have expertise in designing and delivering training within a professional office environment, with a strong understanding of adult learning principles and instructional design. Essential are proficiency in both online and in-person training, as well as experience using the following eLearning tools: Articulate Rise, Storyline, Vyond, Camtasia, and Adobe Creative Cloud. The role requires strong project management skills, experience in content development (including eLearning, videos, and PowerPoint presentations), and a familiarity with accessibility standards. Candidates should also possess excellent communication skills, creative thinking abilities, and a proven ability to simplify complex concepts for diverse audiences. A solid background in customer focus and proficiency in MS Office 365 and Adobe Creative Suite is also required.* Proficiency with eLearning Development Tools – 5 years
* Instructional Design Expertise – 10 years
* Multimedia Content Creation – 5 years
* Learning Management Systems (LMS) – 5 years
* Accessibility and Usability – 5 years
* Project Management – 10 years
* Writing and Editing – 10 years
* Training Delivery – 10 years
* Communication & Collaboration
* Customer Experience (CX) Focus
* Technical Proficiency

Preferred skills:* Cornerstone LMS administration
* MS Planner
* Data Analysis & Reporting
* BI Dashboards

Nice to have:* CPLP Certification

What we are looking for:We are seeking an experienced eLearning Specialist to join the Office of Talent Management, reporting to the Learning & Development Officer. This role will involve conducting needs assessments, defining learning objectives, and designing and developing training content across various delivery formats. The specialist will engage stakeholders, facilitate training sessions, and support learner engagement. Responsibilities include creating eLearning modules, videos, webinars, and training materials, as well as managing SharePoint redesigns and performing data analysis/reporting. |
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| Actuarial Analyst  | Qualifications: Minimum qualified candidates will have experience with the following items: * Bachelor's degree in actuarial science, mathematics, statistics, or related field
* At least two years of equivalent work-related experience (in an actuarial role)
* Advanced knowledge of actuarial theory and methods as applied to employee benefit plans
* Knowledge of data analysis techniques
* Experience using Microsoft Office products, data analysis and statistical tools
* Experience performing financial forecasting and analysis
* Familiarity with accounting standards; governmental accounting standards a plus
* Effective organizational, time management and detail-oriented skills
* Ability to successfully work in a team environment
* Ability to work under pressure and meet deadlines
* Effective verbal and written communication skills
* Experience presenting complex topics to high level executives

Ability to analyze facts and problems, infer and decide on potential and appropriate solutions.What we are looking for:ETF’s Division of Trust Finance is looking for an analytical and motivated actuarial analyst. We are looking for someone who is committed to performing quality work, detail oriented, eager to learn about complex employee benefit programs, and interested in helping the team ensure proper and timely actuarial reporting. We want someone who is able to work effectively in analyzing large amounts of data and dig into complex issues and propose solutions. |
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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 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.  |

**Proposer Response to Each Job Category**

**Instructions:** For every Job Category you have committed to covering in Appendix 6.10, provide a written response that shows

* + your understanding of the Job Category,
	+ your experience filling similar positions,
	+ how that experience is relevant, and
	+ evidence of your firm’s ability to supply personnel with the skills, abilities, and knowledge required to perform that Job Category’s duties and responsibilities.

For 7.5 Other Positions as Needed, if you are covering this Job Category, explain how you will rise to the occasion of sourcing any kind of position necessary to meet ETF’s mission and needs.

**7.1 Accountant (Journey, Senior or Advanced)**

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| <Proposer’s Response Text Here> |

**7.2 Benefit Specialist**

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| <Proposer’s Response Text Here> |

**7.3 Long–Term\* Assistant**

\*for more than 12 months

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| <Proposer’s Response Text Here> |

**7.4 Long – Term\* Professional**

\*for more than 12 months

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| <Proposer’s Response Text Here> |

**7.5 Other Positions as Needed**

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| <Proposer’s Response Text> |