

**Effective Date: March 12, 2000**

**STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION**

**EMPLOYEE BENEFIT PLAN POLICY ADVISOR  
CLASSIFICATION SERIES**

**I. INTRODUCTION**

**A. Purpose of This Classification Specification**

This classification specification is the basic authority under Wisconsin Administrative Code ER 2.04 for making classification decisions relative to professional positions located at the Department of Employee Trust Funds which function as (1) a principal policy advisor to management on issues related to public employee benefit plan(s) or (2) an ombudsperson for participants of public employee benefit plan(s). This classification specification is not intended to identify every duty which may be assigned to positions but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the classification concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards, or factors; statements of inclusion and exclusion; license or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

**B. Inclusions**

This classification series encompasses professional positions which, for a majority of the time, function as (1) a principal policy advisor to management on issues related to public employee benefit plan(s) or (2) an ombudsperson for participants, assuring quality of service and resolving participants' complaints. Public employee benefit plans include the Wisconsin Retirement System; supplemental retirement programs; the deferred compensation program; the employee reimbursement account program; group health, group life, long-term care, and group income continuation insurance programs; disability programs for state and local governments; and any other comparable public employee benefit program established under Chapter 40 of the Wisconsin Statutes. Positions allocated to this classification series must meet the definition of professional employee, as defined in s. 111.81(15), Wis. Stats., and the definition of employee, as defined in s. 111.81(7), Wis. Stats., as it relates to "individuals who are privy to confidential matters affecting the employer-employee relationship."

**C. Exclusions**

Excluded from this classification series are the following types of positions:

1. Positions which do not meet the statutory definition of professional employee, as defined in s. 111.81(15), Wis. Stats.

2. Positions which do not meet the statutory definition of employee, as defined in s. 111.81(7), Wis. Stats., as it relates to "individuals who are privy to confidential matters affecting the employer-employee relationship."
3. Positions which are not located at the Department of Employee Trust Funds.
4. Positions which perform employee benefit functions as identified in the "Inclusions" statement less than fifty percent (50%) of the time are more appropriately identified by the Trust Fund Assistant or Trust Fund Specialist classification series.
5. Positions which spend the majority of the time conducting program and/or research analyses and are more appropriately identified by the Program and Planning Analyst or Research Analyst classification series.
6. All other positions which are more appropriately identified by other classification specifications.

#### D. Entrance Into and Progression Through This Classification

Entrance into this classification is by competitive examination. Progression to the advanced level is typically through reclassification, after the employee has attained the specified training, education, and/or experience necessary to satisfactorily perform the work.

## **II. DEFINITIONS**

### **EMPLOYEE BENEFIT PLAN POLICY ADVISOR - ENTRY**

This is entry-level professional work related to the administration of public employee benefit plan(s). The work performed is similar to that described at the advanced level but is performed under close to limited supervision.

### **EMPLOYEE BENEFIT PLAN POLICY ADVISOR – ADVANCED**

This is advanced-level professional work related to the administration of public employee benefit plan(s). Positions allocated to this classification conceptualize, recommend, and draft administrative rules; present proposed rules to governing boards and legislative committees; implement rules and legislation; ensure plan compliance with federal and state requirements; draft and evaluate requests for proposals for services from third-party administrators and other out-source services, and negotiate contracts with vendors; evaluate and enforce contract compliance and performance by third-party administrators and other out-source services, and determine and negotiate appropriate changes; provide technical assistance to the agency's governing boards; research, analyze, and make recommendations related to benefit plan areas, including bargaining unit demands, grievance settlements, and collective bargaining contract language; research and analyze benefit plans offered by other employers and third-party administrators to identify desirable features and problems; analyze employee's' benefit needs and their use of current plans; review actuarial recommendations; conduct cost-benefit analyses; develop management information for administrators and the Secretary's Office; lead departmental or divisional work teams; and/or serve as an ombudsperson to plan participants. Positions also coordinate and communicate with agency staff, employee benefit plan participants, employers, legislators, the Governor's Office, out-source contractors, and members of the public to resolve complex questions, unusual policy issues, and complaints. Work is performed under the general supervision of a Division Administrator, Bureau Director, or Office Director.

## **III. QUALIFICATIONS**

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an

identification of the education, training, work, or other life experience(s) which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

#### **IV. ADMINISTRATIVE INFORMATION**

This classification was created effective March 12, 2000, and announced in Bulletin CLR/SC-109, in order to describe professional positions which function as a principal policy advisor to management on issues related to public employee benefit plan(s) or as an ombudsperson for participants. This classification replaces the Employee Benefit Plan Policy Advisory classification series created effective May 12, 1996, and abolished effective March 12, 2000 (see bulletins CC/SC-52 and CLR/SC-109, respectively). This classification series was created as a result of the Department of Employment Relations' expansion of the broadband pay system.

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