

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

EMPLOYEE BENEFIT PROGRAM SPECIALIST
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to professional positions located at the Department of Employee Trust Funds which function as a principal program advisor to management on issues related to 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 located within the Department of Employee Trust Funds - Division of Retirement Services **or** the Office of Strategic Health Policy, which, for a majority of the time, function as a principal program advisor to management on issues related to public employee benefit plan(s). Public employee benefit plans includes: 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.

C. Exclusions

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

1. Positions which do not meet the statutory definition of confidential, as defined in s. 111.81(7), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.

2. Positions which are not located at the Department of Employee Trust Funds.
3. 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.
4. Positions which spend the majority of the time specialize in policy analysis, program planning, facility planning, land use or regional planning, program evaluation, or are conducting research and statistical analysis and are more appropriately identified by the Program and Policy Analyst or Research Analyst classification series respectively.
5. Positions which spend the majority of the time being an ombudsperson for participants, assuring quality of service and resolving participants' complaints are more appropriately identified by the Ombudsman Services Specialist classification series.
6. Positions which spend a majority of time serving as a principal policy developer/advisor or program manager for major policy initiatives which have substantial impact on the agency and state resources and are more appropriately identified by Policy Initiatives Advisor – Administrative.
7. Positions which spend the majority of the time function as a Communications Specialist.
8. 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 competition. Progression to the objective full performance level is through reclassification, after the employee has attained the specified training, education, and/or experience necessary to satisfactorily perform the work. Progression to the Advanced level will be solely through competition.

E. Definition of Terms

Departmental Determination: writing a document to provide a resolution to an inquiry based on the provided benefits of the agency.

Developmental level: An intermediate progression level between the entry and objective levels within in a classification series. At a developmental level, the employee is given progressively more complex assignments and/or receives decreasing levels of supervision compared to that at the entry level. This process enables the employee to develop the competence necessary to independently perform the full range of job duties at the objective level.

Full performance level: The level at which the employee demonstrates the expected degree of skill or competence in the satisfactory completion of the duties and responsibilities assigned to the position.

Lead worker: An employee whose permanently assigned duties include training, assisting, guiding, instructing, assigning and reviewing the work of two or more permanent full-time equivalent classified employees in the Lead worker's work unit as assigned and documented on the work unit's organization chart. Lead workers do not have supervisory authority as defined

under s. 111.81(19), Wis. Stats. Lead workers cannot “share” the responsibility of leading the work of employees. For example, if two positions lead the work of one employee each and together jointly lead the work of one more employee, neither position will meet the definition of lead worker.

Major Health Program Area: a program area that encompasses the majority of employees or retirees utilizing the benefits of ETF in the program.

Objective level: That classification level, within a classification progression series, that any employee could reasonably be expected to achieve with satisfactory performance of increasingly complex duties and/or the attainment of specified training, education, or experience. Objective level employees must satisfactorily perform the full range of job duties assigned to that position type under general supervision.

Program: An ongoing set of coordinated activities or functions carried out by several people, aimed at providing a specific service or benefit to a specific group, organization or group of organizations. A program typically has a unique set of policies, regulations, or procedures and a unique set of activities to be performed in providing service or achieving the program’s goals, and a unique set of persons specializing in carrying these out. A program involves a variety of specific projects or functions coordinated to achieve program objectives.

Policy: A broad guideline or framework within which decisions are made regarding the distribution of program resources or benefits. Policy controls the nature of program outputs by defining what will be done, for whom it will be done, and the priorities to be applied to specific program objectives.

II. DEFINITIONS

EMPLOYEE BENEFIT PROGRAM SPECIALIST - 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 senior level but is performed under close to limited supervision.

The emphasis at the level is developing applicable skills in working with and understanding the benefit plan(s).

EMPLOYEE BENEFIT PROGRAM SPECIALIST - JOURNEY

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

The emphasis at this level is becoming more independent in the functions described at the senior level. Employees should be able to answer technical questions related to subject area, manage a benefit cycle process with oversight from senior level staff, work with the senior level staff through applicable negotiations or changes to the benefit plans and work through administrative questions with oversight from senior level staff.

EMPLOYEE BENEFIT PROGRAM SPECIALIST – SENIOR

This is objective-full performance level professional work related to the administration of public employee benefit plan(s). Positions allocated to this classification conceptualize and recommend administrative rules; research and prepare information related to benefit program areas for distribution or presentation to governing boards and legislative committees; 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 provide subject matter experts (e.g., Director, Administrator) with information or strategies to be used in negotiating contracts with vendors; evaluate and enforce contract compliance and performance by third-party administrators and other out-source services, and assist in determining appropriate changes; research, analyze, and make recommendations related to benefit plan areas; research and analyze benefit plans offered by other employers and third-party administrators to identify desirable features and problems; and analyze employees' benefit needs and their use of current plans.

Positions also receive information requests from a variety of stakeholders (e.g., agency staff, employee benefit plan participants, employers, legislators, the Governor's Office, out-source contractors, and members of the public), perform research to provide a response and/or to resolve non-sensitive questions, unusual policy issues, and complaints; responses to the most complex matters are forwarded to Advanced level staff or applicable agency leaders (e.g., administrator, office director, agency legislative liaison) for review and final answering. Positions may review actuarial recommendations and conduct cost-benefit analyses of potential changes to the benefit programs.

Work is performed under the general supervision of a Division Administrator, Bureau Director, or Office Director or direct line designee (e.g., Deputy Administrator, Deputy Director).

EMPLOYEE BENEFIT PROGRAM SPECIALIST – ADVANCED

Positions allocated to this advanced level perform work under general supervision.

Positions at the Advanced level will perform work as the functional expert in drafting and delivering departmental determinations in either the Division of Retirement Services or the Office of Strategic Health Policy for the majority of their time and the number of positions is intended to be limited within the Employee Trust Funds.

These positions serve as the primary point of contact & final reviewer/responsibility due to functional expertise for the departmental determinations within either the Office of Strategic Health Policy or the Division of Retirement Services who draft and present departmental determinations related to health plan rules and member complaints for the majority of their time. The positions manage or coordinate the efforts of team members working to compile data or compose initial responses. These deliverables are required to be conducted on a semi-regular basis and require extensive research of statutes, codes and contracts to create the deliverables.

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.

This classification was modified effective October 23, 2022 and announced in bulleting DPM-0586-CC/SC as a result of the Employee Benefit Policy Advisor personnel management survey, to create a new position level within the series and to remove the ombudsman position which was included in the Ombudsman Services Specialist classification series.

MKL/SKN
RCM/TVR/AS
08661