

**Effective Date: March 12, 2000**

**Modified: September 7, 2003**

**Modified: October 28, 2018**

**STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION**

**TRUST FUNDS DIRECTOR**

**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 supervisory and management positions located at the Department of Employee Trust Funds which function as bureau or office directors within divisions which administer employee benefit program(s) or serve as the Strategic Health Policy Advisor or the Deputy Director of the Office of Enterprise Initiatives. 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 encompasses professional supervisory and management positions located at the Department of Employee Trust Funds which (1) manage and direct bureaus or offices within divisions which administer benefit program(s); (2) serve as the Strategic Health Policy Advisor; or (3) serve as the Deputy Director of the Office of Enterprise Initiatives. Positions allocated to this classification must meet the definitions of supervisor and management, as defined in s. 111.81(19) and (13), Wis. Stats., respectively, with the exception of the Strategic Health Policy Advisor.

C. Exclusions

Excluded from this classification are the following types of positions:

1. Positions which do not meet the statutory definitions of professional as defined in s. 111.81 (15) and management as defined in s. 111.81(113), Wis. Stats.
2. Positions which are not located at the Department of Employee Trust Funds.
3. Positions located at the Department of Employee Trust Funds that do not function as bureau or office directors within divisions or offices which administer benefit program(s) or serve

as the Strategic Health Policy Advisor or serve as the Deputy Director of the Office of Enterprise Initiatives.

4. Positions located at the Department of Employee Trust Funds which are responsible for supervising the activities of a specialized employee benefit program for a majority of the time and are more appropriately classified as Trust Funds Supervisors.
5. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Entrance into this classification is by competitive examination.

## II. DEFINITION

### TRUST FUNDS DIRECTOR

Positions allocated to this classification: (1) manage and direct bureaus or offices which administer employee benefit program(s). Positions are responsible for a wide variety of bureau or office managerial activities, including staff supervision; program planning and administration; contract, law, rule, policy, and procedure formulation, development, and implementation; administrative and operational activities, including establishing objectives and priorities and developing budget proposals; system development and business processes; budget and staff resource allocation; customer service; and substantive issue resolution; (2) function as a single position as the Strategic Health Policy Advisor, who reports to the Director of Strategic Health and Policy, and serve as the primary Department contact for health policy collaboration, strategic alliances, and collaborative purchasing in all areas related to State health insurance plans; or (3) function as the Deputy Director of the Office of Enterprise Initiatives primarily responsible for leading and coordinating cross-functional project teams focused on business automation, change management, process standardization and project management. Work is performed under general supervision.

## 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 supervisory and management positions which function as bureau or office directors within divisions which administer employee benefit program(s) for the Department of Employee Trust Funds. This classification replaces the Trust Funds Director 1 and 2 and Employee Benefit Plan Policy Director classifications which were created effective November 24 and May 12, 1996, and abolished effective March 12, 2000 (see bulletins CC/SC-61 and 52 and CLR-SC-109, respectively). This classification was created as a result of the Department of Employment Relations' expansion of the broadband pay system. This classification specification was modified effective September 7, 2003 and

announced in Bulletin OSER-0002-MRS-SC to include an allocation for the new position of Director of Strategic Health Policy. This classification specification was modified effective October 28, 2018 and announced in Bulletin DPM-0483-CC-SC to include an allocation for the Deputy Director of the Office of Enterprise Initiatives.

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