



Human Resources

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DATE: November 17, 2023

TO: Civil Service Board

FROM: Heather DuVal
Human Resources Supervisor

SUBJECT: Revised Job Classification of Employee Benefits Representative

RECOMMENDATION: APPROVAL OF THE REVISED JOB DESCRIPTION FOR THE CLASSIFICATION OF EMPLOYEE BENEFITS REPRESENTATIVE, INCLUDING A TITLE CHANGE TO SENIOR BENEFITS SPECIALIST.

Background Information/Summary of Job

As you are aware, the City is undertaking a job description review on all job descriptions last revised over 10 years ago. During this project, the job descriptions are being reviewed by both the supervisor of the position, as well as the incumbent(s). The intent of this process is to ensure that the description reflects the current duties of the position, as well as the education, experience, knowledge, skills, and abilities (KSAs) required to perform those duties.

In addition to the revision of the classification specific duties and KSAs, the Human Resources team has created standardized language that is included in all job descriptions and varies slightly based on their level of responsibility. You will see those language additions throughout the revised descriptions, including two new sections regarding supervision received and supervision given.

The Employee Benefits Representative was last revised in 2010. The purpose of this position have evolved to provide leadership and oversight with the overall administration and coordination of the City's benefit programs, including all eligible active and retired members of the Joint Powers Enterprise (JPE). This position conducts research, planning and development of programs and initiatives, and employee education. The position provides responsive customer services, handling difficult issues/complaints, and administers assigned programs/processes. Work requires a high level of independent judgment and decision making. The primary changes to the job description were to update duties to reflect current work performed today.

The proposed revisions to the job classification were discussed with the Confidential union and incumbent, and they are supportive of these updates.

Recommendation

Based on the above information, and in accordance with Section 13-7 of the Civil Service Code, I recommend that the Civil Service Board approve the revised job description for Employee Benefits Representative, including a title change to Senior Benefits Specialist.

Senior Benefits Specialist

SUMMARY/PURPOSE

To provide leadership and oversight with the overall administration and coordination of the City's benefit programs, including all eligible active and retired members of the Joint Powers Enterprise (JPE). This position conducts research, planning and development of programs and initiatives, and supervisor and employee education. The position provides responsive customer service, handling difficult issues/complaints, and administers assigned programs/processes. Work requires a high level of independent judgment and decision-making.

SUPERVISION RECEIVED

The supervisor makes assignments by defining objectives, priorities, and deadlines and assists incumbents with unusual situations which do not have clear precedents. Incumbents plan and carry out the successive steps and handle problems and deviations in the work assignment in accordance with instructions, policies, previous training, or accepted practices in occupation.

SUPERVISION GIVEN

Does not have direct supervisory responsibility but does have significant oversight of employees or project that require delegation and direction over the work of others.

ESSENTIAL DUTIES AND RESPONSIBILITIES

1. Resolve difficult benefit plan issues/problems by serving as liaison between program participants and benefit providers, advocating for the participant as appropriate.
2. Conduct meetings with terminating, retiring, or benefit-ineligible employees and/or their dependents to inform them of their COBRA rights; and resolve COBRA issues by working with vendors, sub-groups and employees.
3. Process benefit enrollments and changes within applicable systems in coordination with employees and vendors.
4. Prepare, review, and maintain benefits materials, records, statistics, and reports to ensure effective quality control and verify compliance with collective bargaining agreements.
5. Develop and coordinate the open enrollment process and any special enrollment processes.
6. Monitor and report on the performance of benefit providers, ensure that vendors adhere to contractual obligations, and resolve issues with vendors.
7. Coordinate and administer leave programs, including military leave of absence, long-term disability, and other related leave programs.
8. Assist with updating plan documents and summary plan descriptions.
9. Maintain awareness of benefit plan trends and changes to laws and regulations related to benefits.
10. Demonstrate an expert understanding of the principles and practices of benefits administration, the laws governing data privacy, and City policies and procedures related to benefit administration; apply this understanding to maintain effective systems for benefits administration.
11. Provide input related to the design and setup of benefit-related HRIS upgrades or conversions.
12. Conduct new employee benefit orientations as needed.
13. Revise and coordinate updates to the Employee Benefits Handbook and assist with drafting or revising benefit-related policies and procedures to ensure compliance with legal requirements.
14. Research and analyze information for proposals related to benefits and participate in management proposal decisions.
15. Participate in the preparation of requests for proposals and the review and analysis of vendor proposals.
16. Research, recommend, develop, and implement process improvements and enhancements to increase efficiencies and effectiveness of benefit administration.
17. Perform routine plan audits to maintain accuracy of benefit plan enrollment records.
18. Assist in preparations for labor contract negotiations by gathering information, analyzing effects of recommended proposals, recommending initiatives for contract changes, and drafting proposal language when necessary.

19. Be an effective team member by exhibiting self-motivation, supporting other employees in handling tasks, interacting effectively and respectfully with others, showing a desire to contribute to the team effort, accepting assignments willingly, and completing tasks within agreed upon timelines.
20. Coordinate with various City departments, other government agencies, and community groups to develop methods of sharing resources, minimizing duplication, and simplifying procedures.
21. Provide training on new or modified procedures and policies to all affected parties.
22. Coordinate and perform benefit related job functions and programs for the City.
23. In collaboration with the supervisor, organize and direct the work activities of assigned team, and determine work priorities, assignments, and work schedules.
24. Provide input on decisions regarding the hiring processes and onboarding procedures of personnel.
25. Establish and maintain positive working relationship with the supervisor and employees by maintaining two-way communication, producing consistent results, advocating for the team when appropriate, and offering expertise to improve processes, systems, and the organization.
26. Other duties may be assigned.

JOB REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skills, and abilities required.

1. Education & Experience Requirements

- A. Bachelor's Degree in business administration, human resources management or a related field and four (4) years of full-time, related professional experience in benefits administration; OR Certified Employee Benefits Specialist (CEBS), plus six (6) years of professional level experience in employee benefits administration; OR a minimum of eight (8) years of related education and/or full-time, verifiable professional benefit administration experience.
- B. Benefits administration experience must be current within the last seven (7) years.

2. License Requirements

- A. No specific licenses required.
- B. Certified Employee Benefits Specialist (CEBS) preferred.

3. Knowledge Requirements

- A. Advanced knowledge of employee benefits principles, concepts, and practices.
- B. Advanced knowledge of governmental regulations and laws related to benefit plans.
- C. Knowledge of Social Security, Medicare, and other retirement plan structures.
- D. Knowledge of statistics and their practical application.
- E. Knowledge of research and data analysis methods and techniques.
- F. Knowledge of customer service standards, principles, and techniques.
- G. Knowledge of problem-solving and conflict-resolution techniques.
- H. Knowledge of applicable safety requirements.
- I. Knowledge of, or the ability to learn, City policies and procedures.
- J. Knowledge of federal, state, and local laws, statutes, regulations, codes, and standards related to the area of responsibility.
- K. Knowledge of effective leadership and personnel practices.

4. Skill Requirements

- A. Skill in providing exemplary customer service and satisfaction with continuous focus on compliance.
- B. Skill in the operation of office equipment including, but not limited to, general computer systems, job required software applications, the internet, and modern office equipment.
- C. Skill in managing one's own time and the time of others.
- D. Skill in completing assignments accurately and with attention to detail.

- E. Skill in mediation and dispute resolution.
- F. Skill in using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.

5. Ability Requirements

- A. Ability to read and understand complex materials, often involving legal and technical matters with which the individual may have little background or knowledge.
- B. Ability to review processes and to compare information in order to identify discrepancies and deviating circumstances.
- C. Ability to perform research, prepare reports, and maintain records.
- D. Ability to create and maintain a positive working environment that welcomes diversity, ensures cooperation, and promotes respect by sharing expertise with team members, fostering safe work practices, and developing trusting work relationships.
- E. Ability to communicate and interact effectively with members of the public.
- F. Ability to communicate effectively both orally and in writing.
- G. Ability to recognize, analyze, and solve a variety of problems.
- H. Ability to organize and prioritize work while meeting multiple deadlines.
- I. Ability to handle difficult and stressful situations with professional composure.
- J. Ability to work successfully as a member of a team and independently with minimal supervision.
- K. Ability to train and lead others.
- L. Ability to interpret and apply laws, contracts, regulations, policies, and procedures.
- M. Ability to enforce safety rules and regulations.
- N. Ability to maintain confidential information.
- O. Ability to demonstrate dependability, responsibility, and consistency in their job performance.
- P. Ability to attend work as scheduled and/or required.

Physical Demands

The work is sedentary. Typically, the employee may sit comfortably to do the work. However, there may be some walking, standing, bending; carrying of light items such as papers, books, small parts; driving an automobile, etc. No special physical demands are required to perform the work.

Work Environment

The work environment involves everyday risks or discomforts requiring normal safety precautions typical of places such as offices, meeting and training rooms, libraries, and residences or commercial vehicles (e.g., use of safe work practices with office equipment, avoidance of trips and falls, observance of fire regulations and traffic signals, etc.). The work area is adequately lighted, heated, and ventilated.

HR: HD	Union: Confidential	EEOC: Professionals	CSB:	Class No: 3233
WC: 8810	Pay:	EEOF: Admin/Finance	CC:	Resolution:
Title change from Employee Benefits Representative (XX-XXXX; xx/xx/xxxx)				

EMPLOYEE BENEFITS REPRESENTATIVE

Senior Benefits Specialist

SUMMARY/PURPOSE: ~~Participate in~~
To provide leadership and oversight with the overall administration and coordination of the City's City's benefit programs.

~~This position assists the Employee Benefits Administrator (EBA) with, including all eligible active and retired members of the Joint Powers Enterprise (JPE). This position conducts research, planning and development of programs and initiatives, and supervisor and employee education. The position provides responsive customer service, handling difficult issues/complaints, and administers assigned programs/processes. Work requires a high level of independent judgment and decision-making, with assistance only on unusual or new situations.~~

FUNCTIONAL AREAS:

~~1. Assist with planning, organizing and coordinating benefit programs.~~

- ~~* A. Participate in the preparation of requests for proposals and the review and analysis of vendor proposals.~~
- ~~* B. Monitor and report on the performance of benefit providers, ensure that vendors adhere to contractual obligations, and resolve issues with vendors.~~
- ~~* C. Coordinate and administer leave programs, including leave of absence, FMLA, sick leave and return to work, and long term disability, conferring with EBA as needed.~~
- ~~* D. Participate in the administration of all hospital medical insurance related programs.~~

E. SUPERVISION RECEIVED

The supervisor makes assignments by defining objectives, priorities, and deadlines and assists incumbents with unusual situations which do not have clear precedents. Incumbents plan and carry out the successive steps and handle problems and deviations in the work assignment in accordance with instructions, policies, previous training, or accepted practices in occupation.

SUPERVISION GIVEN

Does not have direct supervisory responsibility but does have significant oversight of employees or project that require delegation and direction over the work of others.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- ~~1. Resolve difficult benefit plan issues/problems by serving as liaison between program participants and benefit providers, advocating for the participant as appropriate.~~
 - ~~* F. Assist with updating plan documents and summary plan descriptions.~~
 - ~~* G. Assist with research and development of process improvements and new, enhanced or revised benefit programs.~~
 - ~~* H. Maintain awareness of benefit plan trends and changes to laws and regulations related to benefits.~~
 - ~~* I. Provide input into the design and setup of benefit related HRIS upgrades or conversions.~~
- ~~2. Perform other duties related to benefit programs and participant education.~~
 - ~~* A. Coordinate and conduct new employee orientations.~~
- ~~2. B. Conduct meetings with terminating, retiring, or benefit-ineligible employees and/or their dependents to inform them of their COBRA rights; and resolve COBRA issues by working with vendors, sub-groups and employees.~~

3. C. Process benefit enrollments and changes within applicable systems in coordination with employees and vendors.
4. Prepare, review, and maintain benefits materials, records, statistics, and reports to ensure effective quality control and verify compliance with collective bargaining agreements.
- 3.5. Develop and coordinate the open enrollment process and any special enrollment processes.
6. D. Recommend revisions. Monitor and report on the performance of benefit providers, ensure that vendors adhere to contractual obligations, and resolve issues with vendors.
7. Coordinate and administer leave programs, including military leave of absence, long-term disability, and other related leave programs. [HD1]
8. Assist with updating plan documents and summary plan descriptions.
9. Maintain awareness of benefit plan trends and changes to laws and regulations related to benefits.
10. Demonstrate an expert understanding of the principles and practices of benefits administration, the laws governing data privacy, and City policies and procedures related to benefit administration; apply this understanding to maintain effective systems for benefits administration.
11. Provide input related to the design and setup of benefit-related HRIS upgrades or conversions.
12. Conduct new employee benefit orientations as needed.
- 4.13. Revise and coordinate updates to the Employee Benefits Handbook and assist with drafting or revising benefit-related policies and procedures to ensure compliance with legal requirements.
- * E. Participate in Research and/or develop and administer benefit surveys.
- * F. Develop, facilitate and provide information to employees regarding benefit plans.
- * G. Review and disseminate PERA, deferred compensation and other information as necessary.
- * H. Assist with developing and presenting training programs.
3. Participate in research and analysis required for contract negotiations.
- * A. Develop and maintain statistical and other data on current and proposed benefit plans as directed.
- 5.14. B. Research, analyze information for proposals related to benefits and participate in management proposal decisions.
15. C. Analyze. Participate in the preparation of requests for proposals and the review and analysis of vendor proposals.
16. Research, recommend, develop, and implement process improvements and enhancements to increase efficiencies and effectiveness of benefit administration.
17. Perform routine plan audits to maintain accuracy of benefit plan enrollment records.
- 6.18. Assist in preparations for labor contract negotiations by gathering information, analyzing effects of recommended proposals, recommending initiatives for contract changes, and drafting proposal language when necessary.
- * D. Prepare first drafts of proposed language as directed.
19. Be an effective team member by exhibiting self-motivation, supporting other employees in handling tasks, interacting effectively and respectfully with others, showing a desire to contribute to the team effort, accepting assignments willingly, and completing tasks within agreed upon timelines.
20. Coordinate with various City departments, other government agencies, and community groups to develop methods of sharing resources, minimizing duplication, and simplifying procedures.
21. Provide training on new or modified procedures and policies to all affected parties.
22. Coordinate and perform benefit related job functions and programs for the City.
23. In collaboration with the supervisor, organize and direct the work activities of assigned team, and determine work priorities, assignments, and work schedules.
24. Provide input on decisions regarding the hiring processes and onboarding procedures of personnel.

25. Establish and maintain positive working relationship with the supervisor and employees by maintaining two-way communication, producing consistent results, advocating for the team when appropriate, and offering expertise to improve processes, systems, and the organization.
26. Other duties may be assigned.

JOB REQUIREMENTS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skills, and abilities required.

1. Education & Experience Requirements

- ❖ A. ~~Bachelor's~~ Bachelor's Degree in business administration, human resources management or a related field from an accredited college or university, plus three (3) and four (4) years of full-time, related professional experience in benefits administration; OR Certified Employee Benefits Specialist (CEBS), plus six (6) years of professional level experience in employee benefits administration; OR
- ❖ B. ~~Certified Employee Benefits Specialist (CEBS), plus five (5) years of paraprofessional level experience in employee benefits administration; or~~
 - A. C. A combination of a minimum of eight (8) years of related education and/or full-time, verifiable professional benefit administration experience determined by management to be equivalent.
 - B. Benefits administration experience must be current within the last seven (7) years.

2. License Requirements

- A. No specific licenses required.
- A.B. Certified Employee Benefits Specialist (CEBS) preferred.

3. Knowledge Requirements

- A. ~~Considerable~~ Advanced knowledge of employee benefits principles, concepts, and practices.
- B. ~~Considerable~~ Advanced knowledge of governmental regulations and laws related to benefit plans.
- C. ~~C.~~ Knowledge of Social Security, Medicare, and other retirement plan structures.
- D. ~~D.~~ Knowledge of statistics and their practical application.
- E. ~~E.~~ Knowledge of research and data analysis methods and techniques.
- F. ~~F.~~ Knowledge of customer service standards, principles, and techniques.
- G. Knowledge of problem-solving and conflict-resolution techniques.
- H. Knowledge of applicable safety requirements.
- I. Knowledge of, or the ability to learn, City policies and procedures.
- J. Knowledge of federal, state, and local laws, statutes, regulations, codes, and standards related to the area of responsibility.
- K. Knowledge of effective leadership and personnel practices.

4. Skill Requirements

- ❖ A. ~~Skill in communicating logically and accurately in verbal and written form.~~
- ❖ B. ~~Strong computer skills, including HRIS, word processing, database, spreadsheet, presentation and email applications.~~
- ❖ C. ~~Skill in applying sound business judgment in decision-making.~~
 - A. D. Skill in providing exemplary customer service and satisfaction with continuous focus on compliance.

- B. Skill in the operation of office equipment including, but not limited to, general computer systems, job required software applications, the internet, and modern office equipment.
- C. Skill in managing one's own time and the time of others.
- D. Skill in completing assignments accurately and with attention to detail.
- E. Skill in mediation and dispute resolution.
- F. Skill in using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.

5. Ability Requirements

- ❖ A. Ability to communicate one-to-one and before groups to obtain or provide information.
- ❖ B. Ability to work independently and to complete assignments from minimal information or instruction.
- ❖ C. Ability to work under pressures of time constraints and conflicting demands.
- A. D. Ability to read and understand complex materials, often involving legal and technical matters with which the individual may have little background or knowledge.
- ❖ E. Ability to interpret specific rules, laws, policies and benefit contracts and documents and to apply them in a variety of situations.
- B. F. Ability to review processes and to compare information in order to identify discrepancies and deviating circumstances.
- C. G. Ability to perform research, prepare reports, and maintain records.
- D. H. Ability to establish create and maintain effective a positive working environment that welcomes diversity, ensures cooperation, and promotes respect by sharing expertise with team members, fostering safe work practices, and developing trusting work relationships.
- D-E. Ability to communicate and interact effectively with co-workers, supervisors, other employees, retirees and members of the general public.
- ❖ I. Ability to maintain confidentiality.

Physical Requirements

- E-F. A. Ability to sit for extended periods communicate effectively both orally and in writing.
- F-G. B. Ability to transport oneself to, from recognize, analyze, and around the sites solve a variety of projects, meetings and presentations problems.
- ❖ C. Ability to occasionally transport, usually by lifting and carrying, material/equipment weighing up to 25 pounds per load for presentations.
- ❖ D. Fine dexterity to operate computer, calculator and other office equipment.
- ❖ E. Visual acuity to inspect documents for accuracy.
- ❖ F. Ability to hear and speak sufficiently to exchange information in person and by telephone.
- H. G. Ability to organize and prioritize work while meeting multiple deadlines.
- I. Ability to handle difficult and stressful situations with professional composure.
- G-J. Ability to occasionally bend, stoop work successfully as a member of a team and reach for supplies, files, etc independently with minimal supervision.
- K. H. Ability to train and lead others.
- L. Ability to interpret and apply laws, contracts, regulations, policies, and procedures.
- M. Ability to enforce safety rules and regulations.
- N. Ability to maintain confidential information.
- O. Ability to demonstrate dependability, responsibility, and consistency in their job performance.
- H-P. Ability to attend work on a regular basis as scheduled and/or required.

* Essential functions of the position

❖ Job requirements necessary the first day of employment

Physical Demands

The work is sedentary. Typically, the employee may sit comfortably to do the work. However, there may be some walking, standing, bending; carrying of light items such as papers, books, small parts; driving an automobile, etc. No special physical demands are required to perform the work.

Work Environment

The work environment involves everyday risks or discomforts requiring normal safety precautions typical of places such as offices, meeting and training rooms, libraries, and residences or commercial vehicles (e.g., use of safe work practices with office equipment, avoidance of trips and falls, observance of fire regulations and traffic signals, etc.). The work area is adequately lighted, heated, and ventilated.

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WC: 8810	Pay: ———10	EEOF: Admin/Finance	CC: ——20101206	Resolution: 40- 0606R