



Rebecca Grill
City Administrator
City Administration Office
414.302.8294
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MEMORANDUM

TO: Administration & Finance Committee
FROM: Rebecca Grill, City Administrator *rg*
RE: Department Request to Fill Upcoming Vacant Position
DATE: September 26, 2018

I am requesting approval to fill the upcoming vacant position of Wellness and Benefits Coordinator in the Human Resources Department.

According to our continuing procedure, these requests are formally referred to the Administration & Finance Committee for consideration through its normal Council/Committee referral process.

If you have any questions concerning this request, please contact me.

RG:jfw
cc: Mayor
HR Dept.

ADM\Vacpos\VACPOSREQ HR WBCoord 100218



Request to Fill Position

Submit this form, a memorandum and current position description to the City Administrator for review and submittal to the Administration and Finance Committee. To ensure adequate time for review, submit the Friday prior to the Council Agenda Deadline day.

Department/Division: Human Resources Position Title: Wellness and Benefits Coordina

Reason for Request: New Position OR Replacement to Staff - Date of Vacancy: 10 / 04 / 20 18

Person Replaced: _____

Position Status: Full-time Part-time AND Regular Temporary Provisional Special Other

If other than Full-time or Regular, indicate work schedule (hours per week, days to be worked, etc.) and anticipated duration of employment: _____

Funding Source: Operating Grant Other: Health Insurance Fund

Anticipated Date for Filling Position: unknow / / 20

Is the position required for fiduciary, legal or compliance requirements? No Yes, describe: _____

Coordinates and administers all aspects of the City's benefits programs (including, but not limited to, health and dental insurance, Wellness Program, WRS pension, group life insurance, deferred compensation, Section 125 Flexible Spending, HSA, etc.

Why is it necessary that this position be filled? What operational needs does this position fulfill? _____

Coordinate the wellness and benefit programs for employees and retirees

What will be the impacts on service functions to the public if the position is not filled? _____

Service delivery impacts as it relates to the retention and recruitment of a high quality workforce.

What will be the impacts on service to city staff if the position is not filled? _____

Other aspects of the human resources functions will be impacted and staff will not be able to timely perform their duties.

What reorganization possibilities have been considered, such as elimination of the position or combining duties with other existing positions? (If none, provide rationale.) _____

This position was previously realigned.

How has this vacancy/need been covered so far? _____

NA

How many other similar positions exist in this department? None

Requestor Information

Please Print: Rebecca Grill City Administrator Human Resources
Title Department

Signature/Date: Rebecca N. Grill 09 / 25 / 2018

Attached: Memorandum Current Position Description

Job Description Questionnaire

The purpose of the Job Description Questionnaire (JDQ) is to provide the information necessary to evaluate jobs for salary placement, classify jobs for various legal requirements, and to compile appropriate job descriptions.

Please read this JDQ carefully before answering any of the questions and then complete it as accurately, completely, and briefly as possible. While it is not necessary to describe each duty in great detail, it is important to provide sufficient information so the job can be accurately evaluated and classified. Keep in mind that *the purpose of the JDQ is to collect information about the job and is not designed to evaluate employee performance.*

Consider the typical responsibilities of the job; even those that might only occur cyclically (e.g. annually, quarterly, etc.). The responses should be based on duties and responsibilities that are part of the job under typical conditions, not special projects or temporary assignments. Further, unless specifically directed by management, describe the job as it is today, not as you believe it should be or what it might be in the future.

SECTION 1		DEMOGRAPHIC INFORMATION	
Employee Name	Jane Barwick	Employer Name	City of West Allis
Job Title	Benefits/Wellness Coordinator	Work Location	City Hall
Department	Human Resources	Division	N/A
Full-Time / Part-Time	Full-Time	Part-Time (Hrs per Wk)	N/A
Supervisor Name	Audrey Key	Supervisor Title	Human Resources Director

SECTION 2

DESCRIPTION OF ESSENTIAL DUTIES & RESPONSIBILITIES

Identify the essential duties / responsibilities of your job, which should be the most important aspects of the job. This section is focused on **WHAT** is done rather than **HOW** it is done. Use wording that will provide as clear an understanding as possible for someone not familiar with your work. Avoid terminology or acronyms that are not widely known outside of your line of work. Please list those duties that you feel are most important at the top of the list, and list the estimated percentage of the total annual time that each item takes. *(Remember, as a rule-of-thumb, that 10% equates to roughly 200 hours of a work year.)* To the extent possible, try to identify those duties and responsibilities that account for as close to 100% of your work time as possible. While catch-all categories are acceptable (e.g. misc. duties, other duties as assigned, etc.), those sections will likely **NOT** be evaluated.

Frequency Codes: Daily [D] / Weekly [W] / Bi-Weekly [B] / Monthly [M] / Quarterly [Q] / Annually [A] / As Needed [N]

Primary Duties

Coordinates and administers all aspects of the City's benefits programs (including, but not limited to, health and dental insurance, Wellness Program, WRS pension, group life insurance, deferred compensation, Section 125 Flexible Spending, Health Savings Account, Employee Assistance Program, paid time off [e.g. sick leave, vacation, holiday]) with a special focus on healthcare and wellness. Participation in annual benefit plan design review and implementation, strategic planning, and communication of the City's comprehensive Wellness Program and other benefit programs. Provides analysis and recommendations on financial impacts and performance results relating to various programs and accounts.

BENEFITS ADMINISTRATION:

- Responsible for gathering and analyzing data and information for various benefit programs to measure the success of program initiatives and provide recommendations concerning policy decisions;
- Oversees and collaborates with the City's insurance consultant; works directly with other consultants and brokers;
- Participates in the review of insurance proposals including vendor selection, cost control features for the City's self-funded health and dental programs;
- Utilizes metrics in evaluating claims utilization and making design plan recommendations;
- Plays intricate role in the benefit build of the City's self-funded health and dental plans and ensures plans are administered accurately and according to plan provisions; reviews Summary Plan Descriptions and Summary of Benefits & Coverage and recommends approval; distributes booklets accordingly;
- Monitors changes in health care reform mandates, ensures compliance in City's benefit programs and communicates to members per notification requirements;
- Collaborates with IT Dept. to implement enhancements to the HR benefit database and develop specialized reports;

Frequency

D

% of Annual Total Time

100%; estimated breakdown as detailed below

45%

<p><u>BENEFITS ADMINISTRATION continued:</u></p> <ul style="list-style-type: none"> Assists employees, retirees, family members, POAs, etc., with 1:1 interpretation of insurance claims; examines to determine liability and negotiates with TPAs and benefit providers for proper and accurate resolution; serves as liaison for other benefit-related issues and facilitates resolution; Transmits second level insurance appeals on behalf of members; Leads annual Open Enrollment process; creates distribution materials, communicates changes to employees/retirees, arranges for availability/representation by City's insurance consultant and providers, and conducts presentations for actives/retirees; Sets up accounts for new participants via data entry in Maestros and enables the benefit selection process; Processes enrollments, cancellations and status changes for employees/retirees/spouses/dependents within deadlines; performs data entry of enrollments/changes in HR benefit database and conveys applicable related activity to Maestros, TPAs and Finance Dept. for processing; Maintains internal records and conducts periodic audits of all employees/retirees enrolled in insurance coverage; Reviews, reconciles and prepares invoices for payment of monthly health, dental, stop loss, and life insurance billings; Conducts analysis of WRS's rolling 12 month 600/1200 hour reporting on a monthly basis and enrolls employees accordingly; Assigns, enters and tracks codes in HR benefit database and Maestro portal for 1095 MEC/ALE reporting to ensure complete and accurate records; provides attestation to Finance when records are ready for submission to IRS; Administers COBRA and ensures compliance with guidelines; Prepares and files annual reports, including but not limited to, CMS Data Match, Life Insurance Renewal Census, Survey of Public Employment and Payroll, affirmative action status reports, Medicare Creditable Coverage Certification; Performs continued monitoring/maintenance of a comprehensive historical data file of benefit changes; Works with City's TPA on Retiree Drug Subsidy program by auditing, identifying and correcting discrepancies in preparation for attestation; Conducts pre-retirement seminars, providing presentation of benefits to potential retirees; Assists in the development of City policy related to benefit administration; Assists in the development and upkeep of benefit-related communications; updates Intranet accordingly. <p><u>WELLNESS PROGRAM:</u></p> <p>Plans, designs, implements, delivers, evaluates and coordinates a comprehensive Wellness Program for all City employees, encompassing outreach to spouses, dependents and retirees, for the purpose of educating</p>			45%
		D	

WELLNESS PROGRAM continued:

and engaging individuals in healthy lifestyle choices, promoting well-being, avoiding illnesses and injuries, and improving productivity and morale in the workplace;

- Captures support of upper-level management; educates City leadership about current issues and trends in workplace safety, employee wellness and institutional risk management;
- Develops strategies to advance the City's Wellness Program;
- Creates a cohesive Wellness Team/Committee; conducts monthly Wellness Team/Committee meetings;
- Coordinates vendor selection;
- Promotes workplace wellness as a recruitment and retention tool;
- Collects benchmarking and other data, identifies key wellness issues and problems using confidential insurance information and health risk assessment (HRA) data and suggests appropriate interventions;
- Implements results-orientated initiatives that are carefully researched, thoughtfully designed, and efficiently executed, focusing on impacting the City's bottom line through improved employee health and increased productivity while reducing health care costs;
- Suggests cost containment and reduction strategies; plans, develops, coordinates and delivers wellness programs (challenges, awareness, workshops, seminars, and events) that promote fitness, good nutrition, weight reduction, smoking cessation, stress management, mental, emotional and spiritual well-being, responsible alcohol consumption and early detection of treatable conditions, to name a few;
- Procures internal and external health care subject matter experts and resources to achieve health and wellness goals and objectives;
- Develops educational content and creative program marketing pieces to facilitate employee engagement;
- Solicits participation in programs; schedules and coordinates the City's annual HRAs;
- Arranges screenings for health conditions such as high cholesterol, high blood pressure, diabetes and lifestyle-related risk factors;
- Ensures confidentiality of participant information in compliance with federal and State regulations and guidelines; maintains individual health data and records according to Department and HIPAA standards;
- Develops methods to evaluate Wellness Program initiatives; carefully evaluates outcomes for success and prepares reports and conveys program outcomes as required; collects and oversees statistical analyses of data to determine how to set program goals;
- Assists in the preparation and administration of the Wellness Program budget; monitors the Wellness Program budget and observes budgetary limitations;
- Attends quarterly wellness roundtable meetings provided by health insurance consultant;
- Partners/supports/promotes 'Healthy Lifestyles Coalition' efforts; attends meetings.

GENERAL HR DUTIES:

- Reviews and interprets local, State and federal legislation, court decisions, administrative guidelines and rulings for applicability to City policies; ensures compliance;
- Collaborates with HR staff to formulate and establish departmental goals, workplace priorities and allocation of resources;
- Assists HR Director in developing, implementing and evaluating ongoing HR policies, programs, functions and activities;
- Identifies trends that could affect organizational objectives and/or operational resources, evaluates alternative courses of action and makes recommendations, develops realistic action plans, and implements LEAN initiatives for efficiencies;
- Assists employees, supervisors, department heads, and elected officials with HR matters;
- Assists public with varied inquiries;
- Provides input on the development of training and educational programs for City employees and assists with program implementation;
- Compiles and prepares records and reports using available automation and statistical report tools, including a personal computer and appropriate software programs;
- Organizes and maintains paper and electronic filing systems;
- Develops communications, documents, forms, etc. for distribution/posting to City's Intranet;
- Completes varied HR surveys as requested by cities/counties/jurisdictions and provides statistical information upon request;
- Attends various meetings, seminars, webinars and training sessions;
- Participates in professional organizations (e.g., WELCOA, MEA-SEW, WPELRA/NPELRA, SHRM, IPMA);
- Provides backup to HR Generalist;
- Provides backup to HR Assistants - serving as front-line reception to employees, retirees, applicants, visitors, City officials, vendors, etc.;
- May serve as liaison between employees and City management to address confidential/sensitive human resource issues and/or concerns/complaints in an effort to resolve work-related problems;
- May act in the absence of the HR Director and may represent or assist the Director at various meetings such as Administration & Finance Committee, Common Council, etc.

N

10%

SECTION 3

TOOLS AND TECHNOLOGY

Identify any software, technology, equipment or machinery utilized on a regular basis in order to perform the functions of the job:

Office equipment: laptop/IPad, computer with dual-screen monitors, smartphone, multi-line telephone, printer/copier/fax/scanner, paper shredder, 10-key calculator, digital camera and other common office equipment.

Software: Microsoft Office Suite (Word, Excel, Access, PowerPoint, Outlook & Calendaring), Internet, CivicPlus Intranet, Anthem Medical and Dental Enrollment Administration Software, CarePlus Dental Administration Software, Dept. of Employee Trust Funds ONE site (pension participation verifications), Securian's web portal (Life Insurance administration), SunGard/HTE HRIS, HR Benefits (in-house benefit dbase program), SunGard HTE Solutions (enterprise-wide fund and project accounting software including benefits, payroll, purchase orders) and its related System i Navigator (reports generation), NovaTime (timekeeping system), Legistar (legislative process software), Barracuda Message Archiver, Barracuda Secure Messaging System, Secure Messaging Systems of vendors/consultants/TPAs/etc., Cognos Impromptu (report generator), Fortis (electronic document management system) NeoGov online applicant tracking/recruitment software (currently being implemented), Maestro Edge 1095 Reporting and Ben-Admin software.

SECTION 4

JUDGMENTS / DECISION-MAKING

Identify at least five of the most typical judgments/decisions that you make in performing your job as well as the solutions to these problems. Please also describe the resource, input or guidance others provide in arriving at your decision and who reviews, if anyone.

Typical Problems/Challenges	Possible Solution(s) to Problem/Challenge	Resources Available and/or Used	Job Title of Who Reviews
<p>Employee/Retiree Benefits – Administer all aspects of benefit plans for health and dental insurance, WRS pension, group life insurance, deferred compensation, Section 125 Flexible Spending, Health Savings Account, and Employee Assistance Program, giving consideration to how applicable policies, procedures, labor contracts, eligibility requirements and entitlements affect responses. Ensure applicable forms and resources are readily available.</p>	<p>Provide single portal access to employees/retirees to facilitate obtaining valuable plan information, forms, handbooks, communications, etc.; ensure portal interfaces with ALL TPAs for onboarding and upkeep of benefit enrollments and provides direct access/permission for the employer to make updates.</p>	<p>City policies, procedures, handbooks, plan documents, past practices, union contracts, laws, benefit communications, HR Director's knowledge, TPAs, etc.; historical record of benefits and their applicability to the various employment categories (union, non-reps, elected, etc.); learned knowledge and familiarity with benefit plans gained through repetitive administration of such; use of HR Access database and TPA portals.</p>	<p>HR Director</p>

<p>Health & Dental Claims Resolution</p> <ul style="list-style-type: none"> – Assist employees/retirees in the review of claims payment/billing discrepancies; identify reoccurring issues for potential problems in setup of plan design. Provide competent resources to assist in identifying and securing in-network providers. 	<p>Request manual review of claims by TPA to determine justification for how processed/paid. Communicate suspected plan design discrepancies to TPA; request modifications to setup; require affected claims be reprocessed accordingly. Provide comprehensive online portal to facilitate identifying participating network providers; provide phone option for individuals to speak to a customer service representative when calling TPAs.</p>	<p>City policies, procedures, handbooks, plan documents, past practices, union contracts, laws, HR Director's knowledge; historical record of benefits; learned knowledge and familiarity with plans gained through repetitive administration of such; TPA customer service lines; TPA company contact leads for internal HR inquiries only; health insurance consultant.</p>	<p>HR Director; TPA</p>
<p>Monthly Bill Processing/Payment</p> <ul style="list-style-type: none"> – manual review and checking of health/dental/life insurance/stop loss billing statements against internal reports to ensure accurate membership enrollment/payment. 	<p>Create processes to reduce/eliminate manual review of monthly membership. Overcome TPA billing shortfalls (i.e. implement process to verify accuracy in the billing of monthly membership, track enrollments/cancellations, etc.).</p>	<p>Generate internal reports to perform manual audit of City's enrollment against that of TPAs for Life Insurance, Health and Dental Insurance, and stop loss coverage. Utilize Excel's 'File Compare' feature to navigate billing/reporting roadblocks. Enlist help of insurance consultant to advocate for solutions.</p>	<p>Self</p>
<p>Garnering Support for Wellness Program Initiatives</p>	<p>Management support is critical to the success of any wellness initiative. Studies show that management style and perception of management support are strong influences on participation in employer-sponsored health promotion programs. But support for wellness policies and programming often varies by management level and individual. Wellness needs to be embedded into all functions. Encourage managers to serve as motivators and role models--lead by example. Reward for support of initiatives as part of performance evals.</p>	<p>Enlist help of City's Mayor/Administrator/Common Council to advocate importance of program; policy/contracts; learned knowledge and experience; outside resources (e.g. insurance consultant, benefit TPA, CVMIC, HR professional groups/peers); Internet resources; WELCOA/WCW.</p>	<p>HR Director</p>
<p>Wellness Programming Development and Implementation for a Varied Workforce - Provide programming options to accommodate 24/7 operations (Police/Fire), M-F 8 -</p>	<p>Promote the relationship between job satisfaction and physical/mental well being by allowing all employees the opportunity to participate in activities and initiatives; avoid the one-size-fits-all approach; provide custom</p>	<p>Wellness Committee department representatives; learned knowledge and experience; outside resources (e.g. insurance consultant, benefit TPA, CVMIC, HR professional groups/peers);</p>	<p>HR Director</p>

<p>5 employees and non-traditional work schedules for others, acknowledging that the nature of the work/work demands may interfere with availability to attend during “normal” working hours.</p>	<p>programming and options; tailor programs to the specific audience and present them at their location of employment (vs. at another City building); provide flexibility to accommodate time constraints and varied schedules (e.g. view programs in person or “on demand” via electronic resources); incentivize for participation.</p>	<p>Internet/Intranet resources; WELCOA/WCW; Communications Department.</p>	
<p>Planning, coordinating, and implementing benefit and wellness programs in order to enhance existing programs and/or modify in accordance with administrative/Council directives, legal requirements, and/or best practices.</p>	<p>Investigating/analyzing existing programs; researching options; consulting with peers/professional groups; utilizing available tools and resources; communicating effectively with all parties involved.</p>	<p>Learned knowledge and experience; policy/ordinance/contracts/statutes; outside resources, e.g. insurance consultant, benefit TPA, CVMIC, HR professional groups/peers; legal counsel; internet; communication tools, e.g. Intranet, email.</p>	<p>HR Director</p>

SECTION 5

Please identify your typical work relationships with other persons inside or outside of your own organization.

WORKING RELATIONSHIPS / INTERACTIONS / CONTACTS

Title of Individuals With Whom You Typically Interact	Describe the Interaction	Why Was It Necessary?
<p>Department Heads/Supervisors</p>	<p>Provide information, interpretation, recommendations and assistance with on most aspects HR functions.</p>	<p>Respond to inquiries, function as resource/advisor, ensure compliance, provide technical assistance, collaborate on short or long-term strategies, assist with investigations.</p>
<p>Aldermen, Board Members, Committees, Commissions</p>	<p>Attend meetings as an active participant and/or observer; respond to inquiries and requests for information; provide interpretation.</p>	<p>Respond to inquiries and requests for information; serve as a resource and/or provide guidance; ensure programs are administered to guidelines/standards communicated by the parties.</p>
<p>Wellness Committee</p>	<p>Coordinator/Leader of City-wide departmental employee volunteers.</p>	<p>To effectuate and enhance the functions/services of the Wellness Program; provide work direction and guidance.</p>

Employees	Onboarding; respond to inquiries and requests for information regarding most aspects HR functions; collaborate on shared duties.	To effectuate and enhance the functions/services provided by the HR Department; provide guidance/information; address/resolve problems/issues.
Legal Counsel	Work collaboratively on benefit/wellness/HR matters.	Adhere to laws/ statutes/regulations/ policies/contracts; avoid litigation; seek guidance.
Finance/Payroll Dept.	Convey benefit enrollment and status change information for employees and retirees; confirm pay rates; collaborate on retiree health insurance payment collections, audits, interpretation of benefits, etc.	To ensure benefits are administered according to City policies/procedures and individuals are charged accordingly.
Consultants/Vendors	Work collaboratively on project and software implementation, plan interpretation, benefit utilization, cost containment, strategic planning, benefit inquiries, best practices, etc.	To ensure programs are administered according to City guidelines and standards; collaborate on short and long-term strategies; provide guidance/information; address/resolve benefit administration problems with TPAs; follow up on directives and compliance with contracts.
Third Party Administrators	Work collaboratively on the administration of the City's self-insured benefit programs, post-offer drug screens/physical exams, hearing tests, etc.; provide authority, interpretation, guidance and direction.	To effectuate the services of the City's benefit TPAs and to ensure programs are administered according to City guidelines and standards; address/resolve benefit administration problems/issues; follow up on directives and compliance with contracts.
Labor Union Representatives	Work collaboratively; respond to employee inquiries, requests for information, contract language interpretation, etc.	Effectuate processes; maintain amicable relations, respond to inquiries; provide contract language interpretation; process requests for information
Professional Contacts	Inquiries and responses to organizational and HR related matters and practices; networking.	To effectuate/enhance the functions/services provided by the HR Department; keep current in field; share and gather information.
Public	Provide information, interpretation, direction on HR functions, particularly recruitment; respond to general inquiries and assist with connecting individuals with proper department/community services requested.	Respond to inquiries; provide information; process public/open records requests.

Department of Employee Trust Funds/Wisconsin Retirement System/Securian	Perform prior service checks; request information and interpretation of benefits based on employee questions/issues; resolve issues involving enrollment and coverage.	Seek guidance; adhere to the program guidelines of the WRS and Life Insurance programs.
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SECTION 6 SUPERVISION / MANAGEMENT			
Please indicate the type of responsibility you have as it pertains to leading others.			
Area of Action / Responsibility	Yes	No	Provides Input
Screen / Interview Applicants	X		
Hire / Promote Employees			X
Provide Written/Verbal Warnings		X	
Suspend Employees		X	
Terminate Employees		X	
Prepare Work Schedules For Others		X	
Project Management	X		
Provide Work Direction For Others			X
Evaluate Performance Of Others			X
Counsel Employees	X		
Train Employees (As Part Of The Normal Duties Of The Job)			X
Approve Overtime		X	
Approve Time Off Request For Others			X
Develop / Implement Policies			X
Do you directly supervise any employees?		X	X
<i>If yes, please list the number of FTEs and job titles of those employees below:</i>			
Job Title	# of FTEs		

SECTION 7

WORK ENVIRONMENT / PHYSICAL REQUIREMENTS

Please indicate the amount of time typically spent in the following categories.

Physical Requirements	[Place an "X" in the appropriate cells]			
	N/A	Rarely	Occasionally	Frequently
Carrying/Lifting 10 - 40 Pounds			X	
Carrying/Lifting > 40 Pounds		X		
Sitting				X
Standing / Walking / Climbing				X
Squatting/Crouching/Kneeling/Bending			X	
Pushing / Pulling / Reaching Above Shoulder			X	
Work Environment	N/A	Rarely	Occasionally	Frequently
Indoor/Office Work Environment				X
Noise >85dB (e.g. mower, heavy traffic, milling machine, etc.)		X		
Extreme Hot/Cold Temperatures (>90 degrees / <40 degrees)		X		
Outdoor Weather Conditions			X	
Hazardous Fumes or Odors / Toxic Chemicals			X	
Confined Spaces (as identified by OSHA)	X			
Close Proximity to Moving Machinery / Equipment			X	
Bodily Fluids / Communicable Diseases		X		
Working Alongside Moving Traffic on Roads		X		
Electrical Hazards	X			

SECTION 8

ADDITIONAL EMPLOYEE COMMENTS

Please identify any other information that would help someone else understand your job more clearly:

This position requires the ability to travel to various work sites/locations and work a flexible schedule, including hours outside of the normal work schedule, in a variety of settings.

Successful candidate must possess the following:

- Solid work ethic, integrity, emotional intelligence, accountability and initiative;
- Knowledge and skill in the application of public sector human resource principles, practices, objectives, methods, techniques, laws and regulations;
- Knowledge of local government organization and administration;
- Knowledge of benefit plan design and administration;
- Knowledge of statistical analysis methods, survey methodology, and ability to interpret and report results;
- Skill in listening, critical thinking, problem analysis and problem-solving;
- Written/verbal communication skills; ability to tailor the message, context and mode of communication to the audience;
- Ability to multi-task in a fast-paced environment and self-identify organizational, departmental, and individual priorities;
- Ability to work autonomously, in team/collaborative environments and cross-functionally with other departments/divisions;
- Ability to maintain high level of confidentiality and handle information with discretion;
- Skill in monitoring one's own work to ensure quality, accuracy and thoroughness;
- Sound judgment in recognizing scope of authority;
- Knowledge of principles, theories and best practices of worksite health promotion programs;
- Ability to identify health and wellness marketplace and employer trends for the design and development of future wellness program initiatives;
- Ability to foster a culture of health that addresses health risk exposures and promotes behavior modifications;
- Knowledge of return on investment (ROI) outcomes;
- Ability to think strategically, commit to innovation and continuous process improvement, and work collaboratively within the organization to advance the City's vision and strategic plan;
- Ability to establish and maintain relationships with a diverse population at all levels of the organization, outside vendors/consultants/client representatives/peers and the public, and deliver service excellence;
- Ability to relate effectively with people of varied academic, cultural, and socio-economic backgrounds using tact, diplomacy and courtesy;
- Ability to foster an environment that embraces trust and respect.

TO BE COMPLETED BY THE EMPLOYEE'S SUPERVISOR

SECTION 9		SUPERVISOR INFORMATION	
Supervisor Name	Audrey Key	Supervisor Title	Human Resources Director

SECTION 10		EDUCATION REQUIRED FOR HIRE
Level of Education (Select one with an "X")		Field(s) of Study
Less than High School Education		n/a
High School Education (or Equivalent)		
One Year Certificate (or Equivalent)		
Associate's Degree (or Equivalent)		
Required Bachelor's Degree		Human Resources Administration, Public or Business Administration, Health and Wellness, or related field
Master's Degree		
Professional Degree (Law, Medicine, etc.)		
PhD w/ Dissertation		
Other:		
Provide Any Additional Information Regarding the Required Education (e.g. preferred vs. required, specific coursework, etc.):		
Educational emphasis in benefit administration, health education, and wellness programming		

SECTION 11					TOTAL EXPERIENCE REQUIRED UPON HIRE				
[Place an "X" in the appropriate cells]									
No Experience	< 2 yr.	2 to 3 yrs.	4 to 5 yrs.	6 to 7 yrs.	8 to 9 yrs.	10 to 11 yrs.	≥ 12 yrs.		

Entry Level	Solid Professional	Seasoned Professional
Describe Specific Experience Required for Hiring (e.g. 5 total years of customer service experience, 2 of which were in a supervisory capacity):		
Progressively responsible recent HR work experience with emphasis in benefit administration and wellness programs, preferably in the public sector.		
SECTION 12		
CERTIFICATION / LICENSURE / TRAINING TO PERFORM JOB		
List Required Certification/Licensure/Training	How Attained/Provided	Required Upon Hire?
Driver's License	Incumbent attains/maintains on their own accord	Yes
CVMIC's Certificate in Supervision or equivalent coursework	Attend during working hours; cost of coursework provided through the HR Department training budget if monies are available	N/A
LEAN Six Sigma Yellow Belt or equivalent	Attend during working hours; cost of coursework provided through the HR Department training budget if monies are available	Yes; completion expected within 3-5 years of appointment
Nationally recognized certification in health and wellness, such as:		Yes
▪ <u>Certified Worksite Wellness Professional</u> . Offered by the National Wellness Institute in Stevens Point, WI.		
▪ <u>Well Workplace Practitioner</u> . Offered by the Wellness Council of America.		
▪ <u>Certification in Wellness Expertise</u> . Newly added to the lineup of certifications offered by the National Association of Health Underwriters in Arlington, Va.	Attend during working hours; cost of coursework provided through the HR Department training budget if monies are available	Desirable
Proficiency with Windows and Microsoft Office applications and the use of online databases	Incumbent attains on their own prior to hire; continuing education/training provided through the HR Department training budget if monies are available	Desirable
Describe any current practices as it relates to licensure or certification (e.g. extra pay for certification, employer payment for obtaining or renewing, etc.):		Yes
Professional affiliation membership dues paid by City		N/A

SECTION 13**SUPERVISOR'S COMMENTS / CORRECTIONS / ADDITIONS**

In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.

JDQ Section

Comment / Clarification / Addition

TO BE COMPLETED BY ADMINISTRATIVE DESIGNEE**SECTION 14****SUPERVISOR INFORMATION**

Administrative Designee Name

Administrative Designee Title

SECTION 15**ADMINISTRATIVE COMMENTS / CORRECTIONS / ADDITIONS**

In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.

JDQ Section

Comment / Clarification / Addition

L:\PRS\POSITION DESCRIPTIONS\2017.CLASS COMP UNDERTAKING-CONVERSION\DEPARTMENT JDQS & ORGANIZATIONAL CHARTS\HUMAN RESOURCES\BENEFITS WELLNESS COORDINATOR.JDQ UPDATED - REV 9-2018.DOCX