

REPORT NO: 14 18
DATE: 4/9/2014
ANALYST: Michael Hebner

CLASSIFICATION REPORT

PROPOSED TITLE: Manager, Benefits Administration

CURRENT TITLE: HR Principal Consultant (Benefits)

INCUMBENT: Joyce Traver

REASON FOR REQUEST: Audit to assess impact of changes in responsibility on the Grade level assigned for the position.

DATE QUESTIONNAIRE SUBMITTED: 4/2/2014

DATE OF PREVIOUS STUDY: 1998

DISPOSITION OF PREVIOUS STUDY: Retitled from Manager Employee Benefits to Human Resources Principal Consultant

PERSONS INTERVIEWED: Joyce Traver, HR Principal Consultant
Tim Giles, Director Employee Services
Patience Ferguson, Director, Human Resources

RECOMMENDATION: Establish the position as Manager, Benefits Administration (598 points, Grade 13, Appointed)

The position is responsible for the design, implementation, communication, and administration of the City's health and welfare benefit programs. It is responsible for ensuring that the programs adhere to current laws and regulations, and they support the City's strategic objectives. It was last reviewed in 1998. Since 1998 there have been substantial changes in the laws regulating benefits administration, including the 'Patient Protection and Affordable Care Act' and Amendments to the 'Health Insurance Portability and Accountability Act'. Over time the nature of the work in the position has evolved away from a process oriented job which was concentrated on an annual benefits program, to a much more strategic focus and longer term point of view.

The duties of the position include the following:

- Develop long-range benefit and wellness strategies and short-term tactical plans consistent with City goals and objectives.

- Evaluate and compare existing City benefits with those of other employers.
- Maintain professional and technical knowledge by reviewing professional publications, federal and state law changes, establishing personal networks and participating in professional societies.
- Consult with internal partners, benefits consultants and external vendors to strategize and develop recommendations for new plans and changes to current benefit programs; analyze benefit options and predict future costs.
- Recommend benefits programs to management and unions.
- Develop bargaining proposals for employee benefits, analyze union benefit demands, obtain or prepare cost data for company and union proposals and final agreements.
- Solicit, evaluate and recommend benefit plan providers and administrators based on City policy, best practices and Minnesota statutory requirements.
- Manage overall relationships with health and welfare plan vendors including negotiating and preparing new contracts, renewals, and service level agreements.
- Coordinate with vendors to ensure the delivery of administration and customer service is aligned with plan provisions, vendor contracts and strategic intent.
- Manage Benefits Unit staff providing planning, training, and coaching, and monitor and appraise performance.
- Monitor effectiveness of internal plan administration and customer service and implement process improvements to ensure the quality, accuracy and consistency of delivery and improvement of the member experience.
- Ensure City's health and welfare plan documentation, supporting HRIS systems, and administrative practices and communications comply with all applicable Federal and State laws and regulations.
- Serve as Privacy and Security Coordinator for the City of Minneapolis health plans
- Partner with HRTS to ensure that HR systems accurately and effectively support and reflect benefit plan provisions and reporting requirements.
- Oversee the development of all benefits training and communications; to enhance understanding of and appreciation for the City's benefit plan options and promote engagement.
- Achieve financial objectives by preparing the Benefits Unit and HR Department operational budgets; scheduling expenditures; analyzing variances; and initiating corrective actions.
- Oversee preparation of the Benefits section of HR Results Minneapolis presentations
- Serve as member of HR senior leadership team.
- Oversee the City's wellness program

POSITION ANALYSIS

PREREQUISITE KNOWLEDGE

The position requires a Bachelor's Degree in Human Resources, Business Administration, Finance or a related field, and eight to ten years of progressive experience which has included experience in a management level position in a corporate or public sector benefits function. The position requires experience developing, implementing, and managing health and welfare benefit

plans, including retiree health care plans. It requires policy development experience. The position requires strategic and leadership skills.

The position requires a strong working knowledge of Federal and State laws and regulations related to health and welfare benefits, including the Employee Retirement Income Security Act (ERISA), Public Health Safety Act (PHSA); Patient Protection and Affordable Care Act (PPACA), Health Insurance Portability and Accountability Act (HIPPA), Consolidated Omnibus Budget Reconciliation Act (COBRA-Continuation of Benefits), and Minnesota Statutes 471 and 299A.

A rating of **75 points** is appropriate for the level of education and training and experience required.

DECISIONS AND ACTIONS

The position is responsible for the strategic development and management of City's employee benefits program. The job has an on-going responsibility to set strategic direction for Benefits with the City's Benefits Labor Management Committee (BLMC). It is responsible for advising and recommending appropriate action to decision makers regarding benefit plan modifications. It takes a lead position in consulting with internal partners, benefits consultants, and external vendors to strategize and develop recommendations for new plans and changes to current benefit programs; analyze benefit options and predict future costs. The position is responsible for the development of bargaining proposals for employee benefits, analyzing union benefit demands, and obtaining or preparing cost data for City and union proposals and final agreements. The City spends slightly more than \$70 million dollars on benefits annually and the position is involved in all major decisions regarding benefits, and is responsible for providing analysis and advice regarding these important matters.

The position is responsible for managing Benefits staff, including the daily supervision of staff, and responsibility for training and development. It is responsible for overseeing the City's Wellness Program.

The position is responsible for the Benefits portion of the HR/Employees Services Department budget, and for influencing the multi-million dollar City-wide health and welfare budget. It is responsible for developing forecasts of next year's health and welfare benefits expenses for City's Budget. It develops budget projections for Employee Services in the 06900 fund and prepares program budget proposals

The position oversees and ensures the preparation of all benefits related requests for Council actions. Other documents the position is responsible for include mandatory filings to the Government for benefits related issues. It is also responsible for updating HIPPA policies and procedures, and the development and maintenance of HIPPA training materials.

The position operates independently in many of its responsibilities. It needs to get supervisory approval on major plan changes and final plan change positions with unions. Personnel decisions are reviewed with the supervisor.

A rating of **65 points** will be assigned. Jobs at this level manage more significant units entailing greater impact on resources, or serve in a supervisory level staff or analytical capacity. The majority of these jobs are appointed. These jobs require exercise of independent action. Decisions tend to have greater effect on the organization due to greater City-wide impact, more notable budgetary impacts, or longer-term impacts. Work is varied and complex, usually involving multiple phases of a major function. Matters dealt with are broad in scope with complex and unusual problems being encountered frequently. The incumbent is expected to make decisions and take action on problems that arise and to develop solutions to problems involving advanced principles and techniques and original thinking. Work is done under supervision in accordance with broadly stated policies or principles, sometimes of advanced nature and with latitude for the exercise of independent judgment. Decisions and actions are subject to prior approval in high cost, complex or unusual cases.

SUPERVISORY RESPONSIBILITY

The position supervises one HR Senior Consultant, one HR Consultant, and two HR Senior Associate level positions. A rating of **5 points** is appropriate and will be assigned will be assigned.

RELATIONSHIPS RESPONSIBILITY

Within the Personnel Services Division where the job is assigned there is occasional contact with Labor Relations staff to confer and request guidance on employment issues requiring labor agreement interpretation. The position will collaborate with the Compensation Unit on responding to salary survey requests. It will be in contact with the other staff in Human Resources including the HRTS staff regarding data quality and ensuring that benefit information including eligibility and coverage rules, and individual employee elections are correct. The position will serve on the HR Senior Management Team and will participate in special projects as required. The position will interact with the Strategic Workforce Solutions staff to provide information on employee benefit issues.

Contacts with other City Departments include the City Attorneys' Office regarding legal advice and to collaborate on projects. It works closely with the Finance and Property Services Department to regarding requests for proposals, payroll issues, accounting, and budget issues. Matters discussed include approval of health and welfare expenses, payroll taxation related to benefits, benefit budget projections, and the proper setup of vendors for payment. The position will provide information for and may present at Results Minneapolis, entailing contact with City Coordinator staff. The position will work with the Director IT Security regarding policies and procedures related to HIPPA. The position provides summary benefit data to various departments for their budget preparations. The position responds to questions and inquiries from City employees from all levels and from non-employee plan members about benefit issues when the Benefits Unit staff escalates these questions up.

The job has contact with City Officials regarding benefit plan proposals and City Council Action requests several times a year. The position works closely with the City Council on benefits issues.

Outside contacts are with State agencies including the State retirement programs, and with the State Auditor regarding benefit related issues. The job has contact with outside benefit consultants regarding strategy and tactics. It has relationships and contact with various account managers at benefit vendors (health, dental, HSA/HRA, Life/Long Term Disability, Etc.) regarding contract terms, vendor performance, and effectiveness.

A rating of **65 points** will be assigned. Jobs at this level are responsible for creating and maintaining effective relationships that are essential to the success of the job function and that require the use of tact and diplomacy in dealing with departments, agencies and clients on matters that could result in potential lawsuits, have large financial impact, or where the main object will be to achieve successful outcomes for the City's financial operations, or where communications are closely scrutinized, are highly visible and have the potential of harming the City's image.

WORKING CONDITIONS

The position will have normal office working conditions with exposure to computer keyboarding and related normal office equipment. It will be required to attend meetings at various locations. A rating of **20 points** will be assigned consistent with other senior management positions in the City.

EFFORT

The position is responsible for planning, organizing, and managing the City's health and welfare programs. It functions under pressure to meet City and Department budget goals, and to contain benefit costs. The job entails mental effort in analyzing information, formulating strategic plans, preparing documentation, supervising staff, and managing processes. There is pressure in preparing recommendations for City decision makers and unions. There is effort in evaluating and recommending benefit plan providers and administrators based on City policy, best practices and Minnesota statutory requirements.

The job entails effort in managing the overall relationships with health and welfare plan vendors including negotiating and preparing new contracts, renewals, and service level agreements. The job is responsible to ensure that many hard and fast deadlines are met including compliance dates for Federal and State law changes. The position manages the open enrollment process on an annual basis.

A rating of **65 points** will be assigned. At this level the job is a manager with wide ranging responsibilities that require considerable mental effort. These jobs are responsible for planning, organizing and managing larger more complex areas, dealing with setting priorities, and ensuring compliance with City goals and objectives. There is pressure to meet expectations and pressures

driven by budget, project related deadlines, responsiveness to elected officials, and other constituencies, and in making recommendations to higher level managers and officials.

According to the Director, Human Resources and the Director, Employee Services the proposed position meets the criteria for appointed positions under the Minneapolis Code of Ordinance, Section 20.1010 as follows:

1. The person occupying the position must report to head of the designated City Department or the Designated City Department Head's Deputy.

The position reports to the Director Employee Services, who in turn Reports to the Department Head, the Director, Human Resources

2. The person occupying the position must be part of the designated Department Head's management team

The position is a member of the Human Resources Department Senior Management Team

3. The duties of the position must involve significant discretion and substantial involvement in the development, interpretation, or implementation of City or department policy.

The position involves significant discretion and substantial involvement in interpreting, developing, and implementing the City's long-range benefit and wellness policy, strategies, and plans consistent with City goals and objectives.

4. The duties of the position must not primarily require technical expertise where continuity in the position would be significant.

Although the position does require strong knowledge in benefits administration, it also requires strategic and leadership skills not directly related to continuity in the job.

5. There is need for the person occupying the position to accountable to, loyal to, and compatible with the Mayor, City Council, and the Department Head.

The person occupying the position will be accountable to, loyal to, and compatible with the Director Employee Services, and the Director Human Resources, who in turn are compatible with, accountable to, and loyal to the Mayor and City Council.

RECOMMENDATION:

Establish the position as Manager, Benefits Administration (598 points, Grade 13, Appointed)

CLASSIFICATION FACTOR WORKSHEET								
Benchmark Classifications	Factors						Total Points	Grade Level
	1	2	3	4	5	6		
HR Principal Consultant	60	55	10	65	20	60	523	11
Director, HRIS Administration (Proposed)	75	65	10	65	20	65	603	13
PROPOSED CLASSIFICATION								
Manager, Benefits Administration	75	65	5	65	20	65	598	13

1. Prerequisite Knowledge
2. Decisions and Actions
3. Supervisory Responsibility
4. Relationship Responsibility
5. Working Conditions
6. Effort

Executive Exemption

The position meets the 'Executive Exemption' from the provisions of the Fair Labor Standards Act. The employee will be compensated on a salary basis (as defined in the regulations) at a rate not less than \$455 per week. The position's primary duty will be managing the Benefits Unit, a customarily recognized subdivision of the enterprise. The incumbent will customarily and regularly direct the work of four other full-time employees.

The person occupying the position will have influence in the hiring and discipline of other employees. The incumbent's suggestions and recommendations as to the hiring, firing, advancement, promotion, or any other change of status of other employees under its direct supervision will be given particular weight within the City system.

MANAGER, BENEFITS ADMINISTRATION

CODE: C

REPORTS TO: Director, Employee Services

SUPERVISES: Human Resources Senior Consultant, Human Resources Consultant, and Human Resources Senior Associate

NATURE OF WORK

Responsible for the overall design, implementation, communication and administration of the City of Minneapolis health and welfare benefit programs. Ensures that the programs adhere to current law and regulations and support the City's strategic objective

TYPICAL DUTIES AND RESPONSIBILITIES

(Including, but not limited to the following)

- Develop long-range benefit and wellness strategies and short-term tactical plans consistent with City goals and objectives.
 - Evaluate and compare existing City benefits with those of other employers.
 - Maintain professional and technical knowledge by reviewing professional publications, federal and state law changes, establishing personal networks and participating in professional societies.
 - Consult with internal partners, benefits consultants and external vendors to strategize and develop recommendations for new plans and changes to current benefit programs; analyze benefit options and predict future costs.
- Recommend benefits programs to management and unions.
- Develop bargaining proposals for employee benefits, analyze union benefit demands, obtain or prepare cost data for company and union proposals and final agreements.
- Solicit, evaluate and recommend benefit plan providers and administrators based on City policy, best practices and Minnesota statutory requirements.
- Manage overall relationships with health and welfare plan vendors including negotiating and preparing new contracts, renewals, and service level agreements.
- Coordinate with vendors to ensure the delivery of administration and customer service is aligned with plan provisions, vendor contracts and strategic intent.
- Manage Benefits Unit staff providing planning, training, and coaching, and monitor and appraise performance.
- Monitor effectiveness of internal plan administration and customer service and implement process improvements to ensure the quality, accuracy and consistency of delivery and improvement of the member experience.
- Ensure City's health and welfare plan documentation, supporting HRIS systems, and administrative practices and communications comply with all applicable Federal and State laws and regulations.
- Serve as Privacy and Security Coordinator for the City of Minneapolis health plans
- Partner with HRTS to ensure that HR systems accurately and effectively support/reflect benefit plan provisions and reporting requirements.

- Oversee the development of all benefits training and communications; to enhance understanding of and appreciation for the City's benefit plan options and promote engagement.
- Achieve financial objectives by preparing the Benefits Unit and HR Department operational budgets; scheduling expenditures; analyzing variances; and initiating corrective actions.
- Oversee preparation of the Benefits section of HR Results Minneapolis presentations
- Serve as member of HR senior leadership team.
- Oversee the City's wellness program

MINIMUM EDUCATION: Bachelor's Degree in Human Resources, Business Administration, Finance or a related field or equivalent

MINIMUM EXPERIENCE: Eight years of progressive experience which has included experience in a management level position in a corporate or public sector benefits function, developing, implementing, and managing health and welfare benefit plans including retiree health care plans.

LICENSES/CERTIFICATIONS: N/A

OTHER SPECIFICATIONS

- Considerable knowledge of managing health and welfare benefit plans including retiree health care plans
- Considerable knowledge of and skill in negotiating rates and performance guarantees with benefit vendors
- Excellent project management skills, and organizational and process management skills
- Demonstrated ability to manage multiple projects
- Strong working knowledge of federal and state law and regulations related to health and welfare benefits; ERISA/PHSA, PPACA, HIPAA, COBRA, MN Statutes 471 and 299A, etc.
- Excellent written and oral communication skills
- Strong analytical and problem solving skills
- Strong customer service orientation
- Strong team building skills, and the ability to build highly effective professional relationships

WORKING CONDITIONS: Normal

SERVICE:	APPOINTED
GRADE:	12 (598 Total Points) Exempt
ESTABLISHED:	July 2014
JOB SPEC:	July 2014

CITY OF MINNEAPOLIS