City of Portland Job Code: 30000541

# CLASS SPECIFICATION Benefits Manager

FLSA Status: Exempt

Union Representation: Nonrepresented/Incumbents hired after May 25, 2011 are exempt from Civil Service (Ordinance 184616)

#### **GENERAL PURPOSE**

Under general direction, manages and directs a comprehensive City-wide program of employee benefits; develops and recommends benefits program changes to improve the value and cost effectiveness of benefit plans; works with consultants and staff in evaluating program cost, legal compliance and administrative effectiveness; and performs related duties as assigned.

#### DISTINGUISHING CHARACTERISTICS

A Benefits Manager is responsible for designing, developing, evaluating and administering the City's comprehensive employee benefits program both to provide excellent benefits service to employees, retirees and former employees and to ensure compliance with all applicable federal, state and local laws and regulations and a variety of complex and detailed plan requirements. The incumbent assists the Human Resources Director in developing strategic City-wide human resources plans and setting strategic direction in the area of benefits. The incumbent is expected to exercise considerable discretion in carrying out responsibilities independently and with sound professional judgment and problem solving skills.

Benefits Manager is distinguished from Benefits Supervisor by the incumbent's responsibility for analysis and overall administration of the City's multiple and varied benefits plans.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

Any one position in this class may not perform all the duties listed below, nor do the listed examples of duties include all similar and related duties that may be assigned to this class.

- 1. Plans, organizes, controls, integrates and evaluates the work of the assigned staff; develops, implements and monitors work plans to achieve bureau mission, goals and performance measures; directs the development of and monitors performance against the biennial division budget; manages and directs the development, implementation and evaluation of work programs, plans, processes, systems and procedures to achieve City and bureau goals, objectives and performance measures consistent with the City's quality and citizen service expectations.
- 2. Plans, organizes, directs and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development; provides compensation and other rewards to recognize performance; takes disciplinary action, up to and including termination, to address performance deficiencies, in accordance with City Charter, Code, human resources policies and labor contract agreements.

- 3. Provides leadership and works to develop and retain highly competent, service-oriented staff through selection, compensation, training and day-to-day management practices that support the City's and bureau's mission, objectives and service expectations; provides leadership and participates in programs and activities that promote workplace diversity and a positive employee relations environment.
- 4. Designs, develops, oversees, manages, evaluates and administers the City's comprehensive employee benefits program, including medical, dental, vision, life insurance, long term disability, wellness, deferred compensation and Section 125 reimbursement account programs; develops and implements benefit program policies and procedures to ensure that services provided are competitive, consistent with program and City benefit goals and meet employee needs and fiscal constraints.
- 5. Strategically plans the development and implementation of benefit plans, policies and practices to meet current and future needs of employees and the City; recommends program, structure, plan and cost-sharing changes and implements plan improvements; administers health, life, long-term disability, Employee Assistance Program (EAP), voluntary insurance plans and retirement plans offered through a variety of carriers and providers.
- 6. Manages the City's self-insured benefits plan; monitors claims administration to ensure claims payment within plan limits and guidelines; authorizes plan expenditures; oversees the review and resolution of claim disputes; acts as advocate for City employees with benefit vendors and administrators.
- 7. Develops and implements benefits communication plans and activities to educate and inform employees of benefit program plans and values to them; supervises open enrollment communications and events.
- 8. Develops and manages the benefits program budget; manages program costs by forecasting expenditures for determining rates, tracking plan expenditures trends and revenues and reconciling vendor payments; identifies claim trends; tracks and monitors new hires, terminations, family status changes, COBRA and retiree extensions of coverage and eligibility for special plan provisions.
- 9. Develops requests for proposal for benefit plans and administrators; supervises and participates in evaluation of bids; selects and manages outside contractors involved in employee benefit administration; evaluates contractor performance to ensure contract compliance; negotiates agreements and other cooperative efforts on behalf of the City with other agencies, contractors, vendors and program providers.
- 10. Facilitates Labor Management Benefits Committee meetings involved in approving benefit plan design, vendor contracts, funding strategies and cost forecasting; provides information, analysis and recommendations to assist the committee in decision making; monitors 125 plan administration and ensures compliance with ERISA and other legal requirements.

#### **OTHER DUTIES**

- 1. Conducts research and analyses on a variety of benefit program issues.
- 2. Conducts benefits surveys of other agency practices; develops comparisons and recommendations regarding the City's programs, plans and costs.

## MINIMUM QUALIFICATIONS

### **Knowledge of:**

- 1. Principles, practices and administration of benefits management programs.
- 2. Principles, practices, methods and techniques of benefit program design and administration, including eligibility determination, enrollment, claims processing, benefits reporting and insurance/benefit plan record keeping.
- 3. Principles, practices and techniques of public personnel administration, including recruitment, testing and selection, classification, compensation, EEO/affirmative action, employee relations, labor relations, employee development and performance planning and appraisal.
- 4. Federal, state and local laws and regulations governing the administration of employee benefit plans and maintenance of plan/employee records.
- 5. Standard employee benefit plan contract and coverage provisions and requirements and rate and cost determination practices.
- 6. Administrative principles and methods, including goal setting, program development and implementation.
- 7. Principles and practices of public administration, including budgeting, reporting and maintenance of public records.
- 8. Research methods and statistical data analysis techniques.
- 9. Trends in human resource program development, especially in the areas of benefit program design, delivery and cost management.
- 10. City functions and operations and associated human resource management issues.
- 11. Principles and practices of effective business communication.
- 12. Operation of standard business computer software.
- 13. Principles and practices of effective management and supervision.

14. City human resources policies and labor contract provisions.

### Ability to:

- 1. Plan, organize and implement a comprehensive program of employee benefits to meet employee needs most effectively within the City's financial constraints.
- 2. Strategically design, implement and utilize data gathering and reporting procedures in the analysis of benefit plan costs and administration plan contracts.
- 3. Gather relevant data, analyze problems, evaluate alternatives and make appropriate recommendations.
- 4. Understand, interpret, explain and apply City human resource rules, regulations, policies and procedures and applicable local, state and federal legislation and regulations.
- 5. Exercise independent judgement and initiative within established guidelines.
- 6. Present proposals and recommendations clearly and logically.
- 7. Represent the City effectively in dealings with employees and employee organization representative on a variety of affirmative action and equal employment issues.
- 8. Communicate effectively orally and in writing.
- 9. Prepare clear, concise, accurate and persuasive reports, correspondence, analytical studies and other written materials.
- 10. Maintain confidential and sensitive information.
- 11. Exercise tact and diplomacy in dealing with sensitive, complex and confidential human resource issues and employee situations.
- 12. Establish and maintain effective working relationships with bureau and City managers and supervisors, employees, benefit plan vendors and administrators, program beneficiaries, union representatives and others encountered in the course of work.

# **Training and Experience:**

A typical way of obtaining the knowledge, skills, and abilities outlined above is graduation from four year college or university with a major in business or public administration, human resources management or a related field; and seven years of increasingly responsible experience in managing and administering employee benefit plans, at least two of which were in a supervisory capacity; or an equivalent combination of training and experience. Experience in a public agency is preferred.

### Licenses; Certificates; Special Requirements:

A valid state driver's license may be required for certain assignments.

### PHYSICAL AND MENTAL DEMANDS

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depends, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring bureau to accommodate the limitation.

## **Class History:**

Adopted: 07-01-02

Revised: 05-25-11 Ordinance 184616 revised classification to be excluded from the Civil Service.

Class created as a result of Nonrepresented Classification & Compensation Study, 2000-2002. This class

is composed from position(s) within the following class(es)

0632 BENEFITS MANAGER Adopted: 07-01-00

June 2009 - Change Job Class number from 7295 to 30000541, due to system change.