



EMPLOYEE BENEFITS ASSOCIATE I, II & III (HUMAN RESOURCES ASSOCIATE I, II, III)

BASIC FUNCTION

Under close-to-minimal supervision, perform a variety of routine-to-complex technical duties in support of the District's employee benefits, health, welfare and leave programs; serve as a technical expert and resource to district staff, prospective employees, and community partners; participate in developing and implementing employee health and welfare programs which sustain a richly diverse, inclusionary workforce and supports the district's education and equity initiatives.

REPRESENTATIVE DUTIES

The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.

- Perform routine-to-complex responsible technical and responsible duties in support of employee health and welfare benefits programs and services; determine eligibility for new and continuing benefit program participants including employees, retirees, COBRA qualifiers and eligible dependents. "E"
- Interpret and explain rules, regulations, policies, procedures, unit contracts, and fringe benefits; serve as an informational resource to District personnel; respond to inquiries, resolve issues and conflicts and provide information concerning District policies and procedures, negotiated agreements, and employee benefits; assist in solving unique problems of district employees. "E"
- Assist in organizing and administering the Benefits Insurance programs for active and retired employees according to established District policies and procedures, negotiated agreements, federal and State laws, and the Education Code. "E"
- Prepare benefit information for new and returning employees; schedule and conduct individual and group employee orientations concerning benefit programs and services; respond to inquiries and provide information concerning benefits coverage, changes, policies and time lines; assist in planning, organizing, preparing and setting up for open enrollment. "E"
- Serve as a benefits' liaison between plan participants, insurance representatives and various outside agencies; resolve issues, conflicts, discrepancies and concerns as necessary; reconcile insurance billings and collect and arrange for payments; review and audit insurance billings for accuracy. "E"
- Receive, process and evaluate employee benefits enrollment, leave of absence requests, FMLA/OFLA applications, sick leave bank and a variety of other mandated and collective bargaining agreement forms and applications related to employee health, welfare and leave programs; review for accuracy and completeness; explain and assist employees with completing benefit enrollment and LOA forms; establish and maintain employee records and files. "E"
- Coordinate with ADA and Risk departments to ensure that the intersection of FMLA/OFLA leaves, ADA, and Worker's Compensation is recognized and addressed legally and appropriately.
- Schedule and participate in a variety of cross-functional teams to review and assure follow-through on multiple projects, programs and employee issues related to health, welfare, leave and other benefits administration. "E"
- Provide general-to-specialized technical benefits administration expertise to district and site administrators, managers, supervisors and staff regarding employee benefits' matters. "E"

- Compile data and prepare and maintain a variety of records, logs and reports related to employees, benefits, general benefits information, fringe benefits, LOA, ADA and return-to-work requests, COBRA, retirement and assigned activities; establish, update and maintain records and filing systems. “E”
- Input a variety employee health, welfare, LOA, ADA and benefits-related data into assigned computer systems; establish and maintain automated records; initiate queries, extract data and generate a variety of computerized lists and reports; verify accuracy of input and output data. “E”
- Assist employees in highly sensitive, confidential and/or emotional situations regarding benefits’ plan options and usage; provide referrals to local agencies for employees in need of a variety of personal support services; provide lists of community services providers, EAP contacts and related agencies to assist employees in exploring opportunities to meet their needs. “E”
- Attend and participate in a variety of special events related to assigned activities such as employee fairs, workshops and health fairs; schedule and arrange for workshops and other special events as directed. “E”
- Provide assistance with benefits matters and process a variety of information and applications related to volunteers, retirements, COBRA, ADA, disability and/or accommodations requests, OPERS and various special projects as assigned. “E”
- Keep current of changes and trends in human resource benefits administration and technologies; attend in-services, conferences and workshops. “E”
- Demonstrate a commitment to the Portland Public Schools Equity Initiative by developing a thorough knowledge and application of the district Racial Educational Equity Policy and other board policies. Participate in staff development, in-services and trainings related to diversity, equity and inclusion in the workplace and in K – 12 education; model appropriate behaviors; develop, recommend and implement improvements to human resources practices with awareness and understanding of their impact in a racially and culturally diverse community. “E”
- Assist in development, review and revision of employee benefits written policies and procedures. “E”
- Serve in a lead capacity, providing training, work direction and guidance over designated staff, as appropriate to the assignment level.
- Perform other duties as assigned.

Note: At the end of some of the duty statements there is an italicized “E”, which identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.

DISTINGUISHING CHARACTERISTICS OF THE CLASS

The Employee Benefits Associates’ I, II, & III all participate in and disseminate information regarding the health, welfare, retirement and leave programs and processes of the district. Employees in this classification series explore and develop strategies to align activities directly to the district’s Racial Educational Equity Policy and Human Resource’s Strategic Plan. Classifications are differentiated by the scope of responsibility, levels of complexity and supervision received in distribution of assignments.

The Employee Benefits Associate I is the entry-level assignment in the classification series. Under close supervision, employees at this level perform the more routine, repetitive elements of benefits administration, while, with guidance and training, expanding their knowledge and experience to perform the full-spectrum of activities associated with the District’s employee benefits programs. Upon obtaining exemplary and/or satisfactory performance evaluations, employees in this classification are eligible to transition to the Employee Benefits Associate II classification after no less than one (1) year of work experience as an Employee Benefits Associate I.

The Employee Benefits Associate II is the professional-level assignment in the classification series. Within defined parameters, employees are provided greater autonomy in decision-making and perform the full-spectrum of duties involved in employee benefits administration.

The Employee Benefits Associate III is the advanced-level assignment in the classification series. Employees in this classification are assigned the more complex duties of employee benefits administration. Where policy and procedure guidelines provide for latitude and discretion in decision-making, employees in this classification provide guidance and support in recommending appropriate courses of action, within benefits’ plans contracts and rules, as well as local, State and federal legal guidelines. Employees serve as a lead person, providing oversight, training, work direction and guidance to assigned staff. In the absence of an assigned

administrator, employees in this classification will typically serve as the initial point-of-contact when responding to urgent and/or confidential employee health and welfare matters.

EMPLOYMENT STANDARDS

Knowledge of:

Principles, practices and techniques of benefits administration.

Employee benefits programs including ACA, retirement, COBRA, leave of absence and medical plan eligibility and enrollment requirements.

Database, word processing, applicant tracking, and presentation software programs.

State and federal laws, rules, acts, regulations and guidelines governing employee benefits and health and welfare programs.

Report preparation and presentation methods and techniques.

School district organization and administration.

Ability to:

Learn, interpret and apply employee benefits laws, codes, rules and regulations appropriately.

Stay current on laws, practices and trends in human resources health and welfare benefit programs.

Read, interpret, implement and communicate a variety of complex laws, guidelines, initiatives and policies.

Establish and maintain effective and professional relationships with those contacted in the course of work.

Provide detailed and technical information concerning policies and procedures where judgment, knowledge and interpretation of procedures and regulations are required.

Advocate, model, learn and implement Portland Public School's Racial Equity Initiative and other board policies.

Perform multiple complex duties simultaneously with constantly changing priorities and deadlines.

Demonstrate a strong customer service orientation.

Exhibit patience and empathy towards employees.

Maintain confidentiality and demonstrate discretion, initiative and good judgment.

Assure efficient and timely delivery of program services, projects and activities.

Learn and use a variety of technologies and software programs, such as Pro-Law, Microsoft Office Suite, PeopleSoft, district payroll systems and other software programs.

Education, Training and Experience:

The Employee Benefits Associate I requires a Bachelor's degree in human resources, business administration, public administration, psychology, sociology, law, or a related field and experience conducting basic research, preparing reports and/or documents.

The Employee Benefits Associate II requires a Bachelor's degree in human resources, business administration, public administration, psychology, sociology, law, or a related field and a minimum of two (2) years of experience specific to employee benefits programs in a high volume, quick turnaround environment or one (1) year of experience as an Employee Benefits Associate I.

The Employee Benefits Associate III requires a Bachelor's degree in human resources, business administration, public administration, psychology, sociology, law, or a related field and a minimum of three (3) years of experience performing the full-spectrum of all aspects of employee benefits activities, including advising employees on confidential and sensitive issues related to employee benefits programs. Experience serving as a lead person is desirable.

Experience in a K-12 public school district or public agency is desirable.

Directly related experience performing employee benefits program technical and paraprofessional activities may substitute for the required Bachelor's degree on a year-for-year basis.

Any other combination of education and experience that would likely provide the required knowledge and abilities may be considered.

Special Requirements:

Some positions in this classification may require the use of a personal automobile and possession of a valid driver's license.

Licensure as a Notary Public is required within six (6) months of employment and is required to be maintained throughout the course of employment in this assignment.

Work hours may occasionally require variable hours, including evening and weekend attendance at employee benefit fairs and similar events.

WORKING CONDITIONS

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.

Work Environment: Work is performed primarily in a standard office environment with public contact and frequent interruptions.

Hazards: Potential conflict situations.

Physical Demands: Primary functions require sufficient physical ability and mobility to work in an office setting; dexterity of hands and fingers to operate a computer keyboard and other office equipment; sitting or standing for extended periods of time; kneeling, bending at the waist, reaching overhead, above the shoulders and horizontally to retrieve and store files and supplies; lifting, pushing, pulling and carrying office equipment, supplies and materials weighing up to 25 pounds; emotional stability to work effectively under pressure and to keep all aspects of the job under control; hearing and speaking to exchange information in person or on the telephone; seeing to read, prepare and assure the accuracy of documents.

FLSA: EBA I and II - Non-Exempt; EBA III - Exempt

Approval Date: 9-18-2018

Bargaining Unit: Non-Represented

Salary Grade: EBA I – Grade 13, EBA II – Grade 23, EBA III – Grade 28

Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society.

The District is committed to equal opportunity and nondiscrimination in all its educational and employment activities. The District prohibits discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.

Board of Education Policy 1.80.020-P