



### Retirement System Administrator

Class Code	FLSA Status	EEO Category	Represented Status	Salary Grade	Effective Date	Resolution #	Pages
051	Exempt	2 – Professional	AFSCME	8	Revised 9-20-04	2072	1 of 2

**DEFINITION:** Under general supervision; provides advanced-level retirement system analysis and interpretation; analyzes data, laws, regulations, and ancillary retirement plans; writes and develops reports and makes presentations to the Retirement Board; and provides group and one-on-one retirement planning, education, and counseling to current employees and retirees.

**REPORTS TO:** The Retirement System Manager, and receives policy direction from the Retirement Board

**ESSENTIAL FUNCTIONS:**

- Calculates and analyzes estimated and actual retirement benefit determinations for employees, provides information on retirement alternatives and enhancements, and administers the retirement application process.
- Assesses employees' retirement education needs; plans, develops, implements, and evaluates retirement education and outreach programs and functions; and determines appropriate teaching methods and procedures.
- Coordinates activities related to disability retirement including the collection and dissemination of all information from applicants, doctors, attorneys, and related parties; assigns cases to medical examiners; and reviews medical reports to ensure compliance with Retirement Plan rules.
- Assembles information on disability applicants; confers with the Retirement System Manager and outside attorneys; and presents information and recommendations to the Retirement Board in closed sessions, and before hearing officers on appeals.
- Develops, writes, and publishes newsletters, brochures, forms, and other informational for distribution to current employees and retirees.
- Meets with employees on an individual and/or group basis regarding retirement plan options and general retirement issues, including the use of savings plans, investments, deferred compensation, and external retirement plans.
- Plans and coordinates district-wide informational sessions, including facilities and participant scheduling.
- Supervises the activities of the department both during the absence of, and at the direction of the Retirement System Manager.
- Provides reports and analysis to the Retirement Board, makes presentations to the Board, and may provide analysis and materials for Board presentations by the Retirement System Manager.
- Performs or directs the performance of daily operational activities in the Retirement department.
- Oversees monthly and annual retirement payroll processes.
- Assigns work; and reviews retirement calculations made by the Retirement System Assistant, and the work of clerical and temporary staff, as required.



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- Writes, prepares, and maintains a variety of reports and records related to retirement department and retirement education activities.
- Provides information, consultation, and retirement plan interpretation to external attorneys regarding legal issues, and answers routine legal inquiries that effect the distribution of retirement benefits.
- Compiles, reviews, audits, and verifies demographic data on employees and retirees used by the Actuary to determine the economic costs of the retirement plan to the District.
- Performs related duties as required.

**MINIMUM QUALIFICATIONS:**

**Knowledge Of:** Principles and practices of public and private agency retirement systems at an advanced level, including state and federal laws, regulations, and pronouncements related to or affecting pension systems, social security, survivors and disability insurance; 401(K) or 457 deferred compensation plans, defined benefit plans, and retirement fund investments; techniques of retirement program evaluation; principles and practices of public administration and management; teaching methods and procedures; state-of-the-art computer software programs for spreadsheets and word processing at an advanced level, and presentation software at an intermediate level; and modern office procedures and practices.

**Ability To:** Communicate effectively both orally and in writing; deliver oral reports articulately and clearly at open public Retirement Board meetings; formulate answers to questions and concerns from the Board, District employees, and the general public succinctly in an extemporaneous manner for the public record; understand, interpret, and apply provisions of federal, state, and local regulations pertaining to the administration of retirement policies and programs; plan, develop, implement, and evaluate retirement education programs and make recommendations; understand and analyze quantitative and numerical data; write clear and concise reports, memoranda, policies, correspondence, and educational materials;; and establish and maintain cooperative relationships with management, employees, retirees, and representatives and participants from a wide variety of groups and organizations using principles of good customer service.

**Education:** Equivalent to a Bachelor’s degree from an accredited college or university with a major in Finance, Accounting, Business Administration, Public Administration, or a related field.

**Experience:** A minimum of five (5) years of professional level experience in retirement benefits administration or the equivalent, including verifiable experience providing education, outreach, and counseling to plan participants. Experience with payroll functions, PeopleSoft, and/or finance and, accounting, or Human Resources is desirable. A strong background in these fields may be considered as a substitute for direct retirement or benefits experience.

**Special Requirements:** May be required to work occasional evening or weekend hours, and travel to other locations within the District in order to deliver retirement education and outreach presentations.

This Class Specification is intended to present a descriptive list of the range of essential functions performed by an incumbent in this class, but is <b>not</b> intended to reflect all duties performed within the job.	Established 11-16-02. Revised 9-20-04	Approved by Rick Fernandez, General Manager _____ Date _____
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