



Title: Pension and Retiree Services Administrator

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to manage, administer and oversee the activities of the District’s Retirement programs that include employer sponsored defined benefit pension plans and deferred compensation programs, Retirement Board administration and records management. The administrator is also responsible for higher level projects that integrate business strategy and labor agreement provisions as they relate to retiree services as well as supervising, developing and evaluating staff assigned to the various retiree programs. Participates in the activities at all functional levels as needed and may temporarily perform the duties of a subordinate when necessary.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

(S) Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	(L) Light Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree.	(M) Medium Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly.	(H) Heavy Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly.	(V) Very Heavy Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly.
---	---	--	---	---

#	Code	Essential Functions	% of Time
1	S	<p>Pension Plan Administration: Under the general supervision of the Pension Plan Administrator, performs the following functions: Oversee the day to day administration of three separate pension plans, including the potential for multiple tiers within plans. Participate in determining retirement eligibility and, with the assistance of the Plan Actuary, calculate estimated benefit amounts based on the various forms of benefit options. Process applications and prepare all administrative paperwork necessary to assist employees in completing the retirement process. Handle benefit inquiries to ensure quick, equitable, courteous resolution. Maintain contact in person, and by phone or mail, with retirees, employees, staff consultants, vendors and beneficiaries to facilitate proper and complete administration of all pension benefits and programs. Respond to inquiries on retirement policy and procedure, Domestic Relations Orders, and other third party inquiries related to payment of pension and deferred compensation benefits. Develop, implement and maintain policies related to the specialized pension benefit counseling, computation, and pension payroll functions. Maintain and reconcile retiree payroll including adding or removing members from payroll, accounting for all partial payments. Assist in the preparation of annual budgets including</p>	80%



	<p>analysis and development/monitoring. Implementation of controls for retiree health and welfare benefits programs, ensuring all retirees entitled to benefits are supported. Assist in the development or implementation of information systems to calculate and track retirement benefits, store and retrieve member files and information. Oversee technical duties for the preparation of financial and statistical records. Oversee maintenance of retirement records and the issuance of monthly benefit payments and provide work direction to subordinates. Provide records and necessary information to auditors. Review negotiated changes to the Pension Plans as well as legal updates procedures and policies. Coordinate with medical doctors and sub-rosa investigators relative to disability retirements. Make presentations to active and retired members about the retirement system and options.</p> <p>Retirement Board Administration: In accordance with the Brown Act, administer all Retirement Board meetings, including preparation of all required Issue Papers, resolutions, motions, agendas, and other required forms or documents related to the administration of the Retirement Plans’ Board meetings. Oversee process related to the taking, preparation, distribution and approval of Retirement Board minutes. Act as staff and liaison to the Retirement Boards and the Retirement Plan Administrator. Interact directly with the Retirement Board members, Legal Counsel, District staff and actuarial, health care, legal and actuarial/ pension processing professionals. Reply to inquiries from the Retirement Board members, the public, and all California Public Record Act requests which do not involve investments or legal issues. Participate as a committee member on all RFP solicitations for vendor selection in accordance with the District’s procurement ordinance, administer all non-financial related vendor contracts.</p>	
<p>2 S</p>	<p>Retiree Health and Welfare Benefits: Oversee and administer all retiree benefit plans/programs, including ensure retiree benefits are administered in accordance with the District’s negotiated vendor contracts, plan documents, collective bargaining agreements and applicable state and federal regulations. Analyze and evaluate third party administrator and vendor costs and proposals. Oversee and manage retiree open enrollment activities. Coordinate with Labor Relations to provide input for negotiation strategies and to make recommendations to amendments to collective bargaining agreements as they relate to retiree benefit programs. Provide guidance to staff, management and employees regarding complex retiree benefit issues. Prepare and distribute employee communications regarding plan/program details and requirements.</p> <p>Deferred Compensation Program: Administer the day to day management of the employee deferred compensation program,</p>	<p>20%</p>



	<p>including: Serve as primary contact for employees, retirees, plan vendors and third party administrators. Provide excellent customer service support to all. Determine the best plan options for the District by working with the employees and third party administrators. Ensure compliance with applicable government regulations. Coordinate transfer of data to external contacts for services, premiums and plan administration. Work effectively to make sure the plans run smoothly. Investigate discrepancies and provide information in non-routine situations. Document and maintain administrative procedures for assigned benefit processes. Develop communication tools to enhance understanding of the company's deferred compensation benefits packages.</p>	
<p>3 S</p>	<p>As it relates to both the Pension Plan, Retiree Health and Welfare and the Deferred Compensation Program, the following tasks will be associated with each Program: Manage, administer and oversee numerous special projects and programs related to the District's retiree pension and retiree health and welfare benefit programs. Prepare complex reports including detailed statistical and data analysis related to projects and unit activities. Oversee RFP processes related to pension, health and welfare benefit and deferred compensation functions including development of scope of work and evaluation and selection of vendors. Communicate with vendors regarding retiree services and contract term issues and develop and oversee contract budgets. Recommend and implement improved administrative methods and procedures. Provide staff support to committees or other departments as assigned. Develop and oversee retiree records management programs by monitoring and modifying records management retention schedule, developing methods to ensure efficient filing, storage, and retrieval of retiree records, ensuring confidentiality of all records, monitor and test the HRIS, and maintain current knowledge on laws affecting employment records and confidentiality. Supervise subordinate and matrix managed staff responsible for various retiree pension and benefit functions by planning, prioritizing, assigning, monitoring, and reviewing the work of staff members. Act as a resource or subject matter expert for staff in the performance of their duties. Participate in the selection of staff, plan and coordinate staff training and development, evaluate performance, develop performance expectations and improvement plans and monitor performance.</p>	<p>Percentage of time incorporated into the above-referenced tasks</p>



JOB REQUIREMENTS:

-Description of Minimum Job Requirements-	
Formal Education	<p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Human Resources, Business Administration, Public Administration, or a related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p>
Experience	<p>A minimum of five (5) years of experience in Benefit Administration with direct experience in pension plan administration, defined contribution, and/or retiree health and welfare, including two (2) years of supervisory experience. Public sector experience is required; at least three (3) years preferred.</p>
Supervision	<p>Work requires supervising and monitoring performance for a regular group of employees or department including providing input on hiring/disciplinary actions and work objectives/ effectiveness, performance evaluations, and realigning work as needed.</p>
Human Collaboration Skills	<p>Recommendations regarding policy development and implementation are made and/or recommended. Evaluates customer satisfaction, develops cooperative associations, and utilizes resources to continuously improve customer satisfaction.</p>
Freedom to Act	<p>The employee normally performs the duty assignment according to his or her own judgment, requesting supervisory assistance only when necessary. Special projects are managed with little oversight and assignments may be reviewed upon completion. Performance reviewed periodically.</p>
Technical Skills	<p>Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.</p>
Budget Responsibility	<p>Position has moderate fiscal responsibility. May be responsible for the billing, collection and/or accounting of funds. May be responsible for the handling and balancing of cash.</p>
Reading	<p>Advanced - Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports, and/or legal documents. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p>
Math	<p>Advanced - Ability to apply fundamental concepts of theories, work with advanced mathematical operations methods, and functions of real and complex variables. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p>
Writing	<p>Advanced - Ability to write editorials, journals, speeches, manuals, or</p>



critiques. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.
Certification & Other Requirements

KNOWLEDGE
<ul style="list-style-type: none"> • All principles, practices and procedures related to the administration of a government pension plan. • Principles of deferred compensation administration. • Applicable federal, state, and local laws and regulations, including employment and personnel laws and regulations, and the compliance and coordination between all applicable laws and programs. • Effective verbal and written communication skills. • External agency reporting and compliance requirements. • General administration of pretax defined contribution programs such as 401(k), 403(b) or 457. • General methods of tactful public communication. • Practices, principles, methods and techniques of tracking, recording and presenting statistical data. • Methods for obtaining and evaluation of benchmarking and obtain data as it relates to pension and deferred compensation administration, salary, benefits and compensation data. • Negotiation techniques as they relate to vendor contracts. • Policies, procedures, guidelines, regulations, compliance and reporting requirements impacted by external sources. • Principles, practices and techniques of public personnel administration, management and analysis, organization, budget, and communication. • Principles, practices and methods of management, supervision, motivation, training, discipline and performance evaluations. • Public sector employee relations, typical provisions of CBA/MOUs and public employee laws. • Problem solving, organizational, communication and presentation skills. • Principles of organization, administration, budget and human resources management. • Principles and practices of public agency pensions. • Principles and practices of governmental budgeting. • Supervisory practices and procedures. • Principles and practices of benefit program administration. • Organizational rules, procedures, and union contracts. • Reporting requirements to government and other agencies. • Insurance and benefit plan design concepts and legal issues. • Rules, regulations, and laws pertaining to employee records management. • Federal and State laws pertaining to benefits and employee leave programs. • Administration of HRIS database systems.



- Employee orientation programs.
- Effective verbal and written communication skills.
- Effective interpersonal skills including negotiation and conflict resolution.

SKILLS

- Advanced word processing, spreadsheet, presentation and database software.
- Specialized software related to functional area.
- Email, contact management, and scheduling software.

ABILITIES

- Analyze, compare, prioritize and evaluation complex data.
- Apply customer service skills, continuously representing the District in a positive way, handling all internal/external contacts with courtesy, diplomacy, and tact.
- Conduct and make recommendations based on research, analysis, benchmarking and prior knowledge.
- Conduct/make recommendations regarding staffing and organizational analysis.
- Conduct research, prepare and present advocacy materials in a clear and concise manner both orally and in writing.
- Define problem areas, collect and evaluate data and recommend alternative solutions to complex issues and problems. Formulate recommendations and project consequences of recommendations. Be creative in developing and introducing new ideas, using initiative and good judgment.
- Effectively present information and respond to questions from groups, managers, customers, and the general public.
- Establish and maintain effective working relationships with retirees, employees, staff, vendors, third party administrations, other agencies and the public.
- Exercise independent sound judgment and make decisions in a manner consistent with the essential job functions.
- Extract and analyze statistics and written information from reports and transfer to other documents.
- Successfully manage multiple projects, priorities and schedules simultaneously.
- Lead project teams to positive solutions and outcomes.
- Learn HR departmental systems, methods, tasks, and procedures.
- Learn District and other departmental operation policies and procedures.
- Learn HRIS (SAP) processes related to department and job.
- Manage and administer a broad range of tasks including resolving complaints, counseling managers and employees on the interpretation of policies, procedures and union agreements.
- Prepare written reports and correspondences, and presentations to senior leadership as required.
- Prioritize and organization multiple activities for self and staff.
- Project consequences and financial costs of proposed actions, and make and



supporting recommendations and positions.

- Provide professional level support in all areas of pension and deferred compensation administration.
- Read, analyze, interpret and apply District policies, Collective Bargaining Agreements and Memorandums of Understanding professional journals, technical publications and government regulations.
- Read, analyze, and interpret professional journals, technical publications and government regulations.
- Select, supervise, train, motivate, assign, evaluate, counsel and discipline staff.
- Speak clearly and communicate messages to appropriate individuals.
- Speak to groups.
- Work under deadlines, urgent situations and emotional/confrontational situations that require instructing, persuading and motivating people.
- Train and provide project direction to other members of the Human Resources team, other professionals, technical and paraprofessional staff members.
- Develop complex recruiting plans, including attrition models, hiring models and Division level staffing plans.
- Plan, organize, and assign the work of a varied staff of employees.
- Analyze administrative and technical problems and make sound policy and procedural recommendations to their solution.
- Direct the collection, interpretation, and evaluation of data.
- Training and counsel retirees and employees in a variety of areas.
- Prepare comprehensive reports of management activities and costs.
- Select, supervise, training and evaluate subordinates.
- Analyze administrative and technical problems and make sound policy and procedural recommendations to their solutions.
- Train and counsel employees in a variety of areas.
- Learn District and departmental operating policies and procedures, programs and contracts.
- Prepare comprehensive reports of activities and costs.
- Resolve conflicts with tact and diplomacy.
- Review and administer changes to contracts (CBAs/MOUs), rules, procedures, and pertinent laws.
- Effective verbal and written communications with retirees, employees staff, vendors, third party administrators, Board members, consultants, and committee members.
- Data gathering and analyze for application to all benefit programs.
- Make decisions on relative cost and benefits to employees and to organization.
- Complex problem and review of related information to evaluate and make recommendations.
- Investigation various issues, troubleshooting associated program and resolve the situation to the benefit of the employee and the District.
- Maintain and administer the confidentiality of all employee documents.
- Strong people management skills.



- Excellent tact and diplomatic skills.
- Ability to manage multiple priorities simultaneously.
- Ability to effectively manage a variety of subordinate work styles, ensuring attainment of all pre-established goals.
- Project Management Skills.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with "X"-

Sedentary- X	Light	Medium	Heavy	Very Heavy
Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.	Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly.	Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C Continuously 2/3 or more of the time.	F Frequently From 1/3 to 2/3 of the time.	O Occasionally Up to 1/3 of the time.	R Rarely Less than 1 hour per week.	N Never Never occurs.
---	---	---	---	-----------------------------

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

-Physical Demand-	-Frequency-	-Brief Description-
Standing	F	Making presentations, observing work duties, communicating with co-workers
Sitting	F	Desk work; meetings
Walking	F	To other departments/offices; around work site
Lifting	F	Supplies; files
Carrying	F	Supplies; files
Pushing/Pulling	O	File drawers, tables and chairs
Reaching	F	For supplies, for files
Handling	F	Paperwork
Fine Dexterity	F	Computer keyboard; telephone keypad; calculator
Kneeling	O	Filing in lower drawers
Crouching	O	Filing in lower drawers
Crawling	N	
Bending	O	Filing in lower drawers
Twisting	F	From computer to telephone
Climbing	O	Stairs
Balancing	N	
Vision	C	Reading; computer screen, driving, observing work site
Hearing	F	Communicating via telephone/radio, to co-workers/public
Talking	C	Communicating via telephone/radio, to co-workers/public
Foot Controls	N	
Other (specified if applicable)		

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, calculator, copier, scanner, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

C Continuously	F Frequently	O Occasionally	R Rarely	N Never
--------------------------	------------------------	--------------------------	--------------------	-------------------

D Daily	W Several Times Per Week	M Several Times Per Month	S Seasonally	N Never
-------------------	--	---	------------------------	-------------------

-Health and Safety Factors-	
Mechanical Hazards	N
Chemical Hazards	N
Electrical Hazards	N
Fire Hazards	N
Explosives	N
Communicable Diseases	N
Physical Danger or Abuse	N
Other (see 1 below)	N

-Environmental Factors-	
Respiratory Hazards	N
Extreme Temperatures	N
Noise and Vibration	N
Wetness/Humidity	N
Physical Hazards	N

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED: None noted.

NON-PHYSICAL DEMANDS:

F Frequently From 1/3 to 2/3 of the time	O Occasionally Up to 1/3 of the time	R Rarely Less than 1 hour per week	N Never Never occurs
---	---	---	-----------------------------------

-Description of Non-Physical Demands-	-Frequency-
Time Pressure	F
Emergency Situation	R
Frequent Change of Tasks	O
Irregular Work Schedule/Overtime	O
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	F
Noisy/Distracting Environment	O
Other (see 2 below)	N

(2) N/A

PRIMARY WORK LOCATION:

Office Environment	X	Vehicle	
Warehouse		Outdoors	
Shop		Other (see 3 below)	
Recreation/Neighborhood Center			

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.