

# Assistant CEO, External Operations

<b>DEPARTMENT</b>	Executive	<b>REPORTS TO</b>	Chief Executive Officer
<b>TITLE CODE</b>	8313E0	<b>DATE ESTABLISHED</b>	12/11/13
<b>POSITION CODE</b>	R99790	<b>ADMINISTRATIVE REVISION</b>	06/09/15

## Job Summary

The Assistant CEO of External Operations is an at-will executive leadership position that reports directly to the CEO; provides operational guidance to the Board of Retirement, management and professional staff and oversees the Member Services and Communications divisions.

## Distinguishing Characteristics

OCERS executive management staff is expected to uphold the values of accountability, plan sponsor focus, and system efficiency. Responsible for administering the policies and regulations of the Board of Retirement in accordance with the County Employees Retirement Law of 1937; provides effective and ethical leadership for OCERS management team and professional staff; accountable for developing strategies and goals to support OCERS mission and key business objectives.

## Performance Attributes

Include but are not limited to the following in cooperation with the CEO:

- ▶ Guide the strategic direction of OCERS Member Services and Communications divisions.
- ▶ Monitor pension industry to implement best practices for continuous improvement.
- ▶ Establishes and evaluates operating processes and implements changes to policies, procedures, forms and guides.
- ▶ Provides the CEO with policy analysis and recommendations on all facets of OCERS operations.
- ▶ Establishes department performance measurements and assumes accountability for achieving department results.
- ▶ Assist the CEO and Board of Retirement in developing and implementing OCERS operational and strategic planning initiatives.
- ▶ Ensure proper reporting and information flow to external interested parties including the Plan Sponsors, Members, and regulatory and government agencies.
- ▶ Prepares comprehensive cost projections, summaries, reports and recommendations.
- ▶ Manages annual divisional budget and operates within established funding.
- ▶ Ensures the quality standards and compliance with regulations are maintained.
- ▶ Develops administrative policy recommendations relating to all facets of public pension plan administration to improve or expand member services and to achieve business efficiencies.
- ▶ Analyzes the impact of changes in legislative or regulatory requirements; establishes and monitors procedures to implement necessary changes which may be of benefit to OCERS.

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### Qualifications

The minimum qualifications required for entry into the classification are as follows:

#### *Education and/or Experience*

The equivalent of seven years of progressively responsible experience in a comparable public pension system including management, and a Bachelor's degree from an accredited institution in a related field.

**OR**

The equivalent of ten years of professional level pension benefits administration experience, including the equivalent of at least five years in a supervisory or management position, preferably in a California government agency retirement office..

#### *Special Notes, Licenses or Requirements*

- ▶ A valid California class C driver's license or the ability to arrange necessary and timely transportation for field travel.
- ▶ May be required to use personal vehicle.
- ▶ A complete background investigation is required; a felony or misdemeanor conviction may be a disqualifying factor from employment

#### *Knowledge/Skills/Abilities*

The following lists the knowledge, skills, and abilities necessary to perform the essential duties of the position.

##### **KNOWLEDGE OF:**

- ▶ Public Agency administration of staff and activities, either directly or through subordinate supervision.
- ▶ Public relations theory, concepts, practices and strategies.
- ▶ Plan Sponsor personnel rules, practices and procedures as it relates to the administration of a qualified pension plan.
- ▶ Fiscal, actuarial, and cost projection principles and procedures.
- ▶ Actuarial principles pertaining to retirement system funding.
- ▶ Budget development and administration.
- ▶ Supervision and training principles, practices and techniques.
- ▶ Methods and techniques of research, statistical analysis and report presentation.
- ▶ Computer applications and hardware related to the performance of the essential functions of the job.

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### ***SKILLS/ABILITY TO:***

- ▶ To be forward thinking, with the ability to formulate and articulate a strategic vision for external operations.
- ▶ Establish and maintain professional relationships with members of the Board of Retirement, OCERS management and professional staff, plan sponsors, and consultants.
- ▶ Manage and appropriately handle complex political issues involving several competing variables.
- ▶ Plan, organize, integrate and manage OCERS external operations.
- ▶ Prepare complex correspondence, reports, narrative, and fiscal and budget documents for the Board of Retirement, executive staff, managers and present it both orally and in writing so it is understood by all audience levels.
- ▶ Exhibit strong public speaking skills and ability to present to a public board.
- ▶ Work with all personality types and encourage a team approach to resolving problems.
- ▶ Exhibit exemplary interpersonal skills and exercise sound judgment and professionalism in business matters.
- ▶ Perform job functions independently and in an ethical and objective manner.
- ▶ Use standard office equipment such as: computer, printer, scanner, fax machine, photocopier, and 10 key calculator.
- ▶ Use computer software to compose spreadsheets, graphs, flowcharts, presentations, calculations, time reports, etc.
- ▶ Use of OCERS approved means of transportation to travel to and from work sites may be required for some assignments.

### ***PHYSICAL, MENTAL AND ENVIRONMENTAL CONDITIONS***

The following is a description of the physical and mental abilities that are customarily required to perform the essential job functions of this position.

### ***PHYSICAL AND MENTAL REQUIREMENTS***

- ▶ Speak and hear well enough to communicate clearly and understandably in person, over the telephone and in small groups.
- ▶ Manual dexterity sufficient to use hands, arms and shoulders repetitively to operate a telephone, keyboard, write, and use a calculator.
- ▶ Mental stamina to interact professionally with members of the Board of Retirement, Plan Sponsors, peers and members.
- ▶ Vision sufficient to read fine print and a computer monitor.
- ▶ Independent body mobility, agility, and stamina to stand, walk, stoop, bend, and twist, to access a standard office environment.
- ▶ Ability to sit for prolonged periods of time.

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- ▶ Body strength sufficient to lift up to 15 pounds and carry files.

***ENVIRONMENTAL CONDITIONS***

- ▶ The primary work place is in an office environment, working with standard office equipment.
- ▶ Peripheral office equipment generates a quiet to moderate noise level.
- ▶ Operates in an environment that includes elected officials, non-elected officials, government agencies, community interest groups and the general public in the development and coordination of OCERS affairs.
- ▶ Out of area travel may be required to attend professional conferences and meetings.

**ACKNOWLEDGEMENT**

By signing below, I acknowledge I have reviewed and discussed the contents, requirements, and expectations included in this job description with my supervisor and a copy has been provided to me.

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Employee Signature

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Date

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Supervisor Signature

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Date

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HR Signature

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Date