

## **Member Services Director**

<b>DEPARTMENT:</b>	Member Services	<b>REPORTS TO:</b>	Asst. CEO of External Operations
<b>TITLE CODE:</b>	8021 MR	<b>ESTABLISHED:</b>	12/30/11
<b>POSITION CODE:</b>	R96010	<b>ADMINISTRATIVE REVISION:</b>	07/15/2015

### **Job Summary**

Under general direction, plans, organizes, and manages the Member Services and Disability divisions; administers policies and communicates procedures in accordance with the County Employees Retirement Law of 1937, and County and state mandates in the delivery of retirement benefits to retirement system members within the Orange County Employees Retirement System (OCERS).

### **Distinguishing Characteristics**

The Director of Member Services reports directly to the Assistant CEO of External Operations. OCERS management staff is expected to uphold the highest standards of accountability, plan sponsor focus and system efficiency. The incumbent is responsible for managing the overall record keeping, application processing, counseling, and retirement payroll. In addition the incumbent will manage workload issues and assist with the development of operational procedures.

### **Performance Attributes**

Include but are not limited to the following:

- ▶ Coordinates, oversees and administers the Member Services and Disability Retirement divisions.
- ▶ Provides responsive, high quality service to retirement system members, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information in a courteous, efficient and timely manner.
- ▶ Ensures that the County Employees Retirement Law of 1937, Federal and State statutes and OCERS policies are followed in the administration of the benefit programs.
- ▶ Prepares comprehensive cost projections, summaries, reports and recommendations of benefit activities.
- ▶ Responsible for overall development, training, and evaluation of staff, either directly or through subordinate supervision.
- ▶ Participates in hiring decisions, disciplinary actions and other personnel activities.
- ▶ Establishes policies and procedures for administration of the divisions.
- ▶ Consults and meets with various groups including: plan sponsors, governmental agencies, County departments, actuaries, consultants, and retirement system members.
- ▶ Makes presentations before a variety of groups regarding the laws, rules, and benefits of OCERS.

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- ▶ Participates in special projects for the resolution of complex issues regarding the operations and management of OCERS.
- ▶ Interacts with the Department of Human Resources on Workers' Compensation and disability retirements.
- ▶ Prepares complex and confidential correspondence to attorneys or disability applicants.
- ▶ Confers with counsel and directs the preparation of disability cases for administrative hearing and litigation.

### **Minimum Qualifications**

Minimum qualifications required for entry into the classification

#### ***Education/Training/Experience***

A bachelor's degree from an accredited college or university in business administration, finance, economics, accounting or other closely related field.

**OR**

Five years of progressively responsible experience in managing customer service for a retirement program or public pension system.

**AND**

Three years of professional level benefits, health or pension administration experience; at least two years of which must include directly managing staff. Possession of the following certifications are highly desirable:

#### ***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.
- ▶ Highly Desirable: Paralegal certification, Worker's Compensation Claims Professional certification, and/or Certified Employee Benefits Specialist (CEBS).

#### ***Knowledge/Skills/Abilities***

Sample of KSA's necessary to perform essential duties of the position

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

- ▶ Extensive knowledge of the 1937 County Employees Retirement Law and current regulations and statutes as it relates to disability and service retirements, divorce and death benefits

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- ▶ County policies and procedures including Civil Service Rules, the Compensation Ordinance, hiring, purchasing, grievance and disciplinary procedures
- ▶ Plan Sponsor personnel rules, practices and procedures as it relates to a qualified pension plan
- ▶ Supervision and training principles, practices and techniques
- ▶ Actuarial principles pertaining to retirement system funding
- ▶ Defined benefit retirement plans and other types of pension plans
- ▶ Telephone, office, and online etiquette
- ▶ Customer service objectives and strategies
- ▶ Methods of medical or disability claim investigation
- ▶ The workers compensation, medical, and/or disability claims process
- ▶ 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

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

- ▶ Establish and maintain professional relationships with members of the Board of Retirement, Plan Sponsors, OCERS staff, retirement system members and the public
- ▶ Communicate effectively in English both orally and in writing with a variety of individuals representing diverse cultures and backgrounds
- ▶ Maintain a professional demeanor in volatile situations which require a high degree of sensitivity, tact and diplomacy
- ▶ Manage, coordinate, and plan the day-to-day operations of OCERS Member Services and Disability divisions
- ▶ Understand and interpret laws, policies and ordinances
- ▶ Calculate and prepare mathematical data relative to payroll, retirement benefits and actuarial reports
- ▶ Supervise, train, coordinate and evaluate employees
- ▶ Identify and define actual and potential problems or concerns pertaining to the accuracy and integrity of member and transmittal data
- ▶ Perform job functions independently and in an ethical and objective manner
- ▶ Calculate and prepare mathematical data relative to actuarial reports
- ▶ Conduct comprehensive and analytical reviews of medical records
- ▶ Understand and communicate complex medical and legal concepts
- ▶ Exercise appropriate judgment in answering questions and releasing information

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- ▶ Demonstrate strict confidentiality, professionalism, integrity and compliance with applicable laws and regulations at all times
- ▶ Use standard office equipment such as: computer, printer, scanner, fax machine, photocopier and 10-key calculators

### ***Physical, Mental and Environmental Conditions***

The physical and mental demands described here are representative of those that are customarily required to successfully perform the essential functions of this class.

#### ***Physical and Mental Demands***

- ▶ Speak and hear well enough to communicate in English 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 retirement system 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
- ▶ 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

Job Description  
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**Acknowledgement**

By signing below, I acknowledge that 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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Reviewer Signature

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Date