

# Member Services Manager

<b>DEPARTMENT:</b>	Member Services	<b>REPORTS TO:</b>	Member Services Director
<b>TITLE CODE:</b>	8020MR	<b>DATE:</b>	12/30/11
<b>POSITION CODE:</b>	R105537	<b>ADMINISTRATIVE REVISION:</b>	7/17/2015

## Job Summary

Under general direction, provides support to the Member Services Director by managing work schedules, counseling employees, completing evaluations, developing staff, managing special projects and other duties as assigned.

## Distinguishing Characteristics

The Member Services Manager reports to the Member Services Director. OCERS management staff is expected to uphold the highest standards of accountability, plan sponsor focus and system efficiency. Responsible for supervising the activities of assigned professional and technical benefits staff.

## Performance Attributes

Include but are not limited to the following:

- ▶ 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.
- ▶ Responsible for overall development, training, and evaluation of staff.
- ▶ Participates in hiring decisions, disciplinary actions, performance evaluations and other personnel activities.
- ▶ Manages the Member Services and Disability staff by planning, coordinating, prioritizing, and monitoring staff activities.
- ▶ Monitor staff work activities to ensure safe and efficient work practices, quality and accuracy.
- ▶ Develop schedules and methods for performing division assignments.
- ▶ Responsible for performing other specialized duties related to the overall management of the benefits division.

## Minimum Qualifications

Minimum qualifications required for entry into the classification

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### *Education and/or Experience*

A bachelor's degree from an accredited college or university in public or business administration, accounting, or human resources management and a minimum of two years experience supervising staff.

or

Four years of experience at a technical level in a retirement, insurance, or government benefit program, or in a personnel system which involves retirement benefit experience; minimum of two years experience supervising staff.

### *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 a 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.

### *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.
- ▶ County policies and procedures including Civil Service Rules, the Compensation Ordinance, hiring, purchasing, grievance and disciplinary procedures.
- ▶ Supervision and training principles, practices and techniques.
- ▶ Defined benefit retirement plans and other types of pension plans.
- ▶ Telephone, office, and online etiquette.
- ▶ Customer service objectives and strategies.
- ▶ Basic techniques for report writing.
- ▶ Methods and techniques of supervision, training and motivation.
- ▶ Methods and techniques for record keeping.
- ▶ Computer applications and hardware related to the performance of the essential functions of the job.

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

- ▶ Establish and maintain professional relationships with retirement system members, Plan Sponsors, OCERS staff, officials 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 reports.
- ▶ Supervise, train, coordinate and evaluate employees.
- ▶ Perform job functions independently and in an ethical and objective manner.
- ▶ Exercise appropriate judgment in answering questions and releasing information.
- ▶ 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 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 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.

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***Environmental Conditions***

- ▶ The primary work place is in an office environment, working with standard office equipment.
- ▶ Peripheral office equipment generates to 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.

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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.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Reviewer Signature

\_\_\_\_\_  
Date