

Sr. Retirement Manager – Retirement Analyst

DEPARTMENT:	Member Services	REPORTS TO:	Member Services Director
TITLE CODE:	8034MR	DATE:	12/08/2017
POSITION CODE:	R1706780	ADMINISTRATIVE REVISION:	12/08/2017

Job Summary

Under general direction, provides support to the Member Services Director by overseeing quality assurance and training staff, pension system regression testing, managing special projects, developing staff, and reviews procedural compliance within the Member Services division and other duties as assigned. Plans, organizes, 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 Retirement Analyst in Member Services reports to the Member Services Director. OCERS management staff is expected to uphold the highest standards of accountability, plan sponsor focus and system efficiency. The incumbent is responsible for supervising the activities of assigned professional and technical benefits staff. The analyst will routinely collaborate with staff in multiple departments especially Member Services, Disability, Finance, Legal and Information Technology regarding the pension administration system. 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:

- ▶ Provide leadership, direct and functional supervision, work assignments, and guidance to assigned staff within the Member Services and Disability Division.
- ▶ Thorough understanding and experience with OCERS’ business processes, pension system of record and ability to ascertain and translate the needs of the department into vendor requirements and creation of internal training documents.
- ▶ Provide project supervision, leadership, and perform technical and administrative duties for complex projects. Interface and communicate with internal customers and third parties to provide information required to complete regular business processes such as annual actuarial valuations and monthly benefit processing.
- ▶ Effectively communicate and interface with application users, OCERS management and other staff in order to define scope, system requirements and to review project activities, recommendations and outcomes.
- ▶ 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.

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- ▶ 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 department staff.
- ▶ Participates in hiring decisions, disciplinary actions, performance evaluations and other personnel activities as needed.
- ▶ 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

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

Five 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.

Knowledge/Skills/Abilities

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.
- ▶ Use initiative and sound independent judgment within established procedural guidelines to support automation systems and provide process improvements as required.
- ▶ Experience and ability to organize work, set priorities and meet critical deadlines.
- ▶ Business workflows and capabilities of Microsoft Office SharePoint Server 2010/2013, and Microsoft Office suite of products.

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- ▶ Prepare clear, concise and accurate documentation, instructions, correspondence and other written materials.
- ▶ Supervision and training principles, practices and techniques.
- ▶ Defined benefit retirement plans and other types of pension plans.
- ▶ Communicate effectively, orally and in writing, with both technical and non-technical personnel.
- ▶ Customer service objectives and strategies.
- ▶ Advanced 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.

SKILLS/ABILITY TO:

- ▶ Establish and maintain professional relationships with retirement system members, Plan Sponsors, OCERS staff, officials and the public.
- ▶ Demonstrate strict confidentiality, professionalism, integrity and compliance with applicable laws and regulations at all times.
- ▶ Communicate effectively in English both orally and in writing with a variety of individuals representing diverse cultures and backgrounds.
- ▶ Maintain a professional demeanour in volatile situations which require a high degree of sensitivity, tact and diplomacy.
- ▶ Understand and interpret laws, policies and ordinances.
- ▶ Plan and coordinate the work of others.
- ▶ Perform job functions independently and in an ethical and objective manner.
- ▶ Consults and meets with various groups including: plan sponsors, governmental agencies, County departments, actuaries, consultants, and retirement system members.
- ▶ Exercise appropriate judgment in answering questions and releasing information.
- ▶ Use standard office equipment such as: computer, printer, scanner, fax machine, photocopier and 10-key calculators.

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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 and large 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.

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