MAJOR FUNCTION

This is responsible professional, technical, and administrative work performing specialized assignments in the City's Retirement Administration Division. An employee in this class is responsible for coordinating staff and resources dedicated to the daily activities of the Alternate Social Security Plan, mid-career retirement program, pre-retirement education program, site visit program, and other assigned programs. Work is performed under the general supervision of the Retirement Officer with considerable latitude for use of independent judgment. Work is reviewed through conferences, analysis of work, reports and observations of results obtained.

ESSENTIAL AND OTHER IMPORTANT JOB DUTIES

Essential Duties

Oversees the Alternate Social Security Plan, develops Plan forms, procedures, and employee communication materials, and investigates and resolves any problems, disputes or concerns of employees regarding this plan. Audits the benefit calculations of other division employees for quality control.   Explains retirement benefits to individuals or groups in counseling sessions to ensure participants make informed decisions. Compares Section 401(k) Plan to Section 457 Plan for employees through the composition and distribution of brochures, work sheets and individual counseling sessions. Counsels with employees concerning special limits in retirement plans and other provisions specified in federal law.   Coordinates and oversees the Employee Orientation/Enrollment process for the City's retirement plans. Composes a wide variety of retirement literature, such as annual benefits statements to participants, summary plan descriptions, summary plan modifications, and descriptions of the matched annuity pension plan. Monitors new trends in retirement benefits, conducts research on retirement benefits, federal guidelines and legislative developments and makes recommendations for changes in retirement policy based on research and implements such changes when approved. Ensures that plan documents and procedures are in compliance with federal and state regulations. Prepares recommendations for the Division's annual budget.   Coordinates and supervises staff and resources dedicated to the mid-career and pre-retirement education programs. Develops material for distribution on these programs, schedules programs, and determines the list of participants.   Monitors non-discrimination testing of the retirement programs for compliance with federal regulations.   Recommends the hiring, transfer advancement, grievance adjustment, termination or discipline of assigned staff. Evaluates assigned staff and recommends the approval or merit increases. Performs related work as required.

Other Important Duties

Prepares the annual report for the State of Florida in compliance with state law. Coordinates the pension administration computer system with the payroll and human resource systems. Acts in the absence of the Retirement Officer.   Tracks the disability retirement process and counsels with seriously ill employees regarding death and disability benefits. Performs related work as required.

DESIRABLE QUALIFICATIONS

Knowledge, Abilities and Skills

Considerable knowledge of the City's charter provisions, pension ordinances, the Florida Statutes, and Internal Revenue Code, as it relates to pensions. Considerable knowledge of the City's organizational structure and the City's Policies and Procedures. Considerable knowledge of the Division's policies and procedures. Considerable knowledge of statistical concepts and methods used in collecting and reporting data. Ability to communicate effectively with diverse groups of individuals both orally and in writing. Ability to organize work priorities. Ability to understand and interpret complex legislation. Ability to analyze situations and effectively resolve problems. Ability to assess programs and proposed policies for their financial and administrative impact. Ability to prepare reports and to present them clearly and concisely. Ability to assist in the development of long-term

plans and evaluate work accomplishments. Ability to establish and maintain effective working relationships as necessitated by the work. Ability to plan, oversee, train and review work of assigned staff. Skill in the use of personal computers and associated programs and applications necessary to successful job performance.

Minimum Training and Experience
Possession of a bachelor's degree in business or public administration, public relations, human resources or a related field; and three years of professional or administrative experience in retirement administration, benefits calculation, benefits administration, financial calculations, or an equivalent combination of training and experience.

Necessary Special Requirements
At the department director's discretion, a valid Class E State driver's license may be required at the time of appointment for any of the designated positions allocated to this class.

Established: 04-21-94
Revised: 06-04-01
                09-29-03*
                04-27-09*