

**MAJOR FUNCTION**

This is responsible technical and professional work performing specialized assignments in the City's Retirement Administration Division. An employee in a position allocated to this class is responsible for coordinating retiree health insurance, and other benefits, cost-of-living increases, and bi-weekly employee orientation meetings. Work involves calculating and explaining retirement benefit estimates; and final benefits; entering retirement related data onto the PeopleSoft Human Resources Management System; fulfilling reporting requirements for governmental agencies; and coordinating several pension related meetings and committees. Day to day work is performed with considerable independence; however, unusual or difficult problems are referred to an administrative supervisor. Work is reviewed through conferences, analysis of work, reports and observation of results achieved.

**ESSENTIAL AND OTHER IMPORTANT JOB DUTIES****Essential Duties**

Calculates estimated and final benefits according to the pension ordinance and division policies and procedures. Researches and requests certified salaries from the City's payroll office for final benefit calculations. Explains retirement benefits in individual counseling sessions with plan participants. Enters and maintains retirement related data on the PeopleSoft system. Coordinates salary certification, calculation and records maintenance for employees that have a vested retirement benefit. Presents pension information at bi-weekly employee orientation meetings. Enrolls new employees in the City's retirement plans. Coordinates the annual meetings for Police, Fire, and General employees. Schedules meeting times and place, prepares agendas, ballots and reports for distribution. Collects data and composes reports such as the division's Annual Retirement System report for the Board of Trustees and plan participants, the U. S. Government's Census report of locally administrated retirement systems, and the Define Contribution-401(k) report required by the State of Florida. Coordinates site visit programs that present investment information to employees. Coordinates the appearance of representatives of the City's investment plans and attends site visit meetings as a resource person. Coordinates the retiree's health insurance and other benefits programs, retiree deduction/payroll changes, coordinates the distribution of annual pension statements, and retiree cost-of-living increases. Coordinates with designated staff to maintain sensitive data on the PeopleSoft system. Serves as contact/resource person for the City's retirees. Updates and maintains Excel spreadsheets for calculations purposes. Researches, analyzes and calculates amounts due for the buyback program. Coordinates the "Super-User" program. Performs related work as required.

**Other Important Duties**

Processes annual disability retiree income verifications and recertifications. Audits payroll file against the record of deceased retirees/payees, researches discrepancies between the two and recommends action. Coordinates with the City's 401(k) and 457 third party administrators to assist participants with rollovers to purchase buyback time. Updates plan guides and summary plan modifications as needed. Maintains and updates the division's web site. 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 the Internal Revenue Code as it relates to pensions. Considerable knowledge of the City's organizational structures and policies and procedures. Considerable knowledge of statistical concepts and methods used in collecting and reporting data. Considerable knowledge of training techniques and methods. Ability to communicate effectively with diverse groups both orally and in writing. Ability to organize work priorities. Ability to analyze complex data. Ability to prepare reports and present them clearly and concisely. Ability to establish and maintain effective working

relationships with consultants, governmental agencies, auditors, vendors, and other City staff. Skill in the operation and use of a microcomputer and calculator. Skill in the use of personal computers and various computer applications to include spreadsheets and word processing.

Minimum Training and Experience

Possession of a bachelor's degree in business or public administration, public relations, human resources, or a related field and two years of experience in retirement administration, benefits calculation, benefits administration, fiscal administration; 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: 02-23-94

Revised: 10-17-02  
09-29-03\*  
04-27-09\*