

**MAJOR FUNCTION**

This is responsible, professional and administrative work in the administration of the City's retirement and pension system. The incumbent is responsible for the orientation and enlistment of new employees, counseling and processing of retiring employees, servicing of existing retirees; ensures compliance with all state and federal regulations. Considerable independent judgment, discretion and initiative is exercised. Work is performed under administrative direction of the Deputy City Treasurer-Clerk and the work is reviewed through conferences, reports, observation and by results obtained.

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

Plans, directs, manages and oversees the activities and operations of the City's retirement and pension program. Orients and enlists new employees. Plans, coordinates, and conducts educational seminars. Calculates pension benefits for retiring employees. Counsels and processes retiring employees; counsels mid-career employees relating to retirement planning. Develops quality and productivity improvement capabilities to improve services and effectiveness. Provides staff support to the pension advisory committees. Maintains accurate individual employee pension records. Stays abreast of current federal and state legislation affecting public pension plans. Provides responses to inquiries whether in person, by telephone, or through correspondence. Coordinates with departments and physicians relating to disability/health related retirements. Assigns, trains, directs, and evaluates the work of subordinate clerical and professional personnel. Recommends the selection, transfer, promotion, grievance resolution, discipline, or dismissal of supervised employees. Conducts performance evaluations and recommends approval or disapproval of merit increases. Prepares and administers division budget. Performs related work as required.

**Other Important Duties**

Recommends, prepares and implements pension plan ordinance amendments. Collects data, prepares and submits the Actuarial Valuation. Provides counseling and guidance to beneficiaries of deceased plan members. Conducts an annual audit of benefit payment amounts and the entitlement of payees. Participates in union negotiations concerning pension benefits. Performs related work as required.

**DESIRABLE QUALIFICATIONS****Knowledge, Abilities and Skills**

Thorough knowledge of the principles and practices pertaining to public retirement and pension plans in the State of Florida. Knowledge of retirement transaction procedures. Thorough knowledge of federal and state legislative impacts on public pension plans. Thorough knowledge of retirement vehicles available for public pension plans. Thorough knowledge of fiscal investment and statistical analysis techniques. Knowledge of Actuarial Valuation concepts. Considerable knowledge of microcomputer spreadsheet applications. Considerable knowledge of the practices, principles and techniques of accounting, budgeting and auditing. Considerable knowledge of financial record keeping and reporting principles and practices. Considerable knowledge of union contract negotiation procedures. Considerable knowledge of the principles of supervision, training and performance evaluation. Ability to deal tactfully and courteously with employees, beneficiaries, and vendors. Ability to express oneself clearly and concisely, both orally and in writing. Ability to analyze problems and exercise sound professional judgment to arrive at logical and valid conclusions. Ability to establish and maintain effective working relationships as necessitated by the work. Ability to assign and review the work of employees and provide proper instructions in a manner conducive to improved performance and high morale. Ability to analyze, plan, organize, recommend and/or implement work flow procedures. Ability to make presentations in front of large groups. Possesses management style

and values that are consistent with the City's mission and values. Demonstrates interpersonal facilitation and communication skills. Skill in the use of microcomputers and associated programs and applications necessary for successful job performance.

Minimum Training and Experience

Possession of a bachelor's degree in business or public administration, finance, human resources, or a related field and three years of administrative and managerial experience that includes pension/employee benefits administration; or an equivalent combination of training and experience. One year of the required experience must have been in a supervisory capacity.

Established: 04-05-89  
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10-08-03\*  
07-13-09\*