



**Orange County Department of Education
Human Resources Department
Classified Management Class Specification**

Coordinator, Retirement Services

**Class Code: 1432
Work Days: 225**

GENERAL PURPOSE

Manage, supervise, and coordinate the activities and operations associated with providing retirement processing, reporting, and compliance services to school and community college districts and the County Office; and provide highly responsible and complex staff assistance to higher level management staff.

SUPERVISION RECEIVED AND EXERCISED

1. Receives general supervision from higher level management staff
2. Exercises direct supervision over managerial, technical, and/or clerical staff

ESSENTIAL DUTIES AND RESPONSIBILITIES

This position description is intended to describe the general nature and level of work performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

1. Recommend and assist in the implementation of goals, objectives, and strategic plan; establish schedules and methods for providing specialized services; implement policies and procedures.
 2. Identify opportunities for improving service delivery methods and procedures; review with appropriate management staff; implement improvements.
 3. Advise internal staff and district clients regarding various retirement related policies, procedures, legislation, and regulatory changes.
 4. Provide assistance to school and community college districts in planning, project implementation, analysis, and problem resolution.
 5. Design and deliver a variety of presentations for school and community college districts.
 6. Select, train, supervise, and evaluate assigned personnel; work with employees to correct deficiencies.
 7. Provide coaching to employees; collaborate on goal development, set clear expectations, provide constructive feedback, and check in regularly for understanding.
 8. Plan, prioritize, assign, supervise, and review the work of staff responsible for providing services within Retirement Unit; prepare work schedules for appropriate staff.
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ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

9. Network with outside agencies and organizations; act as liaison between districts and various regulatory agencies at the State and Local levels; provide staff assistance to the Director, Support Services, prepare and present staff reports and other necessary correspondence.
10. Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of pension systems and retirement services.
11. Demonstrate attendance sufficient to complete duties of the position as required.
12. Perform related duties similar to the above in scope and function as required.

QUALIFICATIONS (KNOWLEDGE, SKILL, ABILITY REQUIREMENTS)

Knowledge of:

1. Principles, methods, and practices of human resources, payroll, pension systems, and retirement operations.
2. Principles of analysis, use, and interpretation of accounting, payroll, retirement, and financial data.
3. Principles of effective supervision, leadership, training, coaching and performance evaluation.
4. Procedures, methods, and techniques of project and workflow management and organization.
5. Function and use of applications related to retirement processing and reporting including payroll, human resources, and finance.
6. Principles, terminology, and practices utilized in payroll, benefits, and retirement administration.
7. Federal, state, and local laws, codes, and regulations affecting assigned work area.
8. Legal and reporting requirements related to retirement processing and pension systems.
9. Organization, maintenance, and retention of comprehensive payroll/retirement system records.
10. School district systems and employment procedures.
11. Business letter writing and basic report preparation.
12. Training principles and methodologies.

Ability and Skill to:

1. Manage implementation and training of the school districts in use of County Systems in compliance with pension system requirements and regulations.
2. Select, train, lead, coach, direct the work of, supervise, and evaluate professional and technical employees; effectively delegate authority and responsibility.
3. Interpret the organizational and division strategic plan and create relevant goals and plans for assigned areas.
4. Compile, analyze, interpret, and report research findings.

Ability and Skill to (cont.):

5. Establish and maintain effective working relationships with various constituencies.
6. Understand, interpret, and explain laws, codes, contracts, policies, and procedures.
7. Develop and present training materials.
8. Prepare clear and concise correspondence, reports, and other written materials.
9. Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.

Education, Training and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is a Bachelor's degree from an accredited college or university with major course work in business, accounting, public administration, or a related field, and four years of responsible retirement reporting, payroll administration, or related experience.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, employees are regularly required to bend, stoop, push, pull, grasp, squat, twist, kneel, walk, sit, and reach to access materials or equipment and complete other tasks as assigned; lift and carry up to 25 pounds; and lift from ground, waist, chest, shoulder, and above shoulder level. The position may include occasional need to traverse uneven surfaces.

Employees in this classification are to be able to travel countywide to a variety of sites within a reasonable time frame; read written and electronic materials; communicate clearly in person, on the phone, and via email; and operate all required equipment.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform highly detailed work; work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Employee typically works in an office environment that is variably paced with moderate to high pressure.

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