



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

Manager, Retirement

Class Code: 1672

Work Days: 225

GENERAL PURPOSE

Manage, supervise, plan, and coordinate the activities and operations of retirement processing, reporting, and compliance services to school and community college districts and the County Office; and provide staff assistance to higher level management staff.

SUPERVISION RECEIVED AND EXERCISED

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

ESSENTIAL DUTIES AND RESPONSIBILITIES

This position description is intended to describe the general nature and level of work being 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. Develop, implement, and evaluate work programs, plans, processes, systems, and procedures to achieve department/program and OCDE goals, objectives, and performance measures consistent with OCDE's quality and service standards.
 3. Supervise retirement processing and retirement-related activities, including compliance with CalSTRS and CalPERS regulations.
 4. Provide assistance in planning, project implementation, analysis, and problem resolution to school districts; serve as a liaison between the Retirement Services unit, Department personnel and divisions, vendors, and federal, state, and local government agencies regarding retirement-related activities and operations.
 5. Design and deliver a variety of presentations for school and community college districts.
 6. Select, train, plan the work of, supervise, and evaluate staff; provide coaching to employees; collaborate on goal development; set clear expectations; provide constructive feedback; assist in improvement as needed; and check in regularly for understanding.
 7. Establish and implement appropriate internal procedures and controls for the processing of retirement functions and the remittance and reporting of retirement contributions and reports. Re-evaluate and refine programs and procedures to enhance the overall operation of retirement services to districts.
 8. Develop and maintain a written procedure manual in the areas of retirement processing, and other retirement-related activities.
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9. Conduct research and analysis, compile data, develop reports, and make recommendations;
 10. Network with outside agencies and organizations; act as a liaison between districts and various regulatory agencies at federal, state, and local levels; provide staff assistance to the directors in Business Services; prepare and present staff reports and other necessary correspondence.
 11. Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of retirement reporting and compliance.
 12. Demonstrate attendance sufficient to complete duties of the position as required.
 13. 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 pension systems and retirement operations.
2. Retirement laws, regulations, and court decisions governing retirement processing and related transactions.
3. Principles of analysis, use, and interpretation of accounting, payroll, retirement, and financial data; methods, practices, documents, and terminology used in payroll processing transactions and in financial record keeping.
4. Principles of effective supervision, leadership, training, coaching and performance evaluation.
5. Procedures, methods, and techniques of project and workflow management and organization.
6. Function and use of applications related to retirement processing and reporting, including human resources, finance, and payroll.
7. Legal and reporting requirements related to retirement processing and pension systems.
8. Organization, maintenance, and retention of comprehensive payroll and retirement system records.
9. School district systems and employment procedures.
10. Business communication and formatting professional business correspondence and basic report preparation.
11. Training principles and methodologies.
12. OCDE human resources policies and procedures and labor contract provisions.

Ability and Skill to:

1. Manage implementation and training of the school districts in the use of the 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.
5. Establish and maintain effective working relationships with various constituencies.

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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 in business, accounting, public administration, or a related field, and four (4) years of experience in payroll systems, tax compliance, or a related field.

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.

Physical Demands

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification must be able to travel countywide to a variety of sites within a reasonable time frame, read written and electronic materials, and communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); perform deskwork for extended periods; and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces and move items weighing up to 25 pounds.

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 essential functions.

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