Orange County Department of Education
Human Resources Department
Classified Class Specification

Class Code: 3107
Date Adopted: 7/1/2024

FLSA Status: **Nonexempt**
Union Representation: **Represented**

Retirement Specialist

GENERAL PURPOSE

Under general supervision, provides lead work direction and technical guidance to OCDE's retirement services unit, focused on the processing and reporting of certificated and classified employee retirement benefits data for county school districts and other educational agencies, as well as related financial reporting activities; calculates retirement contributions and submits reports to state offices; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

Retirement Specialist is a lead classification responsible for overseeing the day-to-day processes of OCDE's retirement services unit, providing technical guidance to OCDE's retirement services staff, and performing difficult, complex, detailed calculations and record-keeping activities consistent with applicable legal requirements. Work is performed with a significant degree of independence within the framework of established policies and procedures.

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. Perform the preparation of monthly retirement report data that is submitted to the State Teachers Retirement System (CalSTRS) and Public Employees Retirement System (CalPERS); assist supervisors and management in ensuring mandated timelines and submission deadlines are achieved; and ensure retirement payment dates are met.

2. Produce the monthly CalSTRS/CalPERS deadline calendars for distribution; perform auditing and balancing of selected retirement reports produced by unit staff; resolve complex discrepancies in report to ensure correct employer and employee retirement contributions are paid; and revise and update user guides, manuals, and related retirement reporting documents.

3. Oversee and prepare appropriate fund transfers, deposits for district charges, abatements, and applicable Countywide summary reports for CalSTRS and CalPERS retirement plans; set up worksheets for balancing PERS and STRS transfers; and ensure remittance payments to CalSTRS and CalPERS offices by scheduled deadlines.

4. Assist the supervisor, management, and IT programmers with system design, changes, modifications, enhancements, and testing of all retirement programs; assist in enhancing the production of

retirement reporting through database maintenance; and assist in automating processes to eliminate manual reports and recordkeeping.

5. Serve as a liaison between internal and external retirement reporting system users and external retirement reporting agency personnel by addressing questions about retirement reporting and related laws, rules, regulations, and procedures. Provide guidance and assistance to districts with retirement system audits.

6. Assist client districts' employees with resolution of complex problems in the areas of service credits, salary overpayments, retroactive payments, and refunding of mandatory contributions; and make payroll adjustments as needed.

7. Conduct training for school district staff in the areas of retirement and payroll reporting; assist districts in the implementation of special retirement benefit programs and coordinate reporting requirements with the respective retirement system; and assist supervisor and management in conducting training for newly hired staff in the retirement unit; explain all applicable rules, laws, government codes, and education codes.

8. Assist in providing workshops and training for retirement reporting to internal and external system users.

QUALIFICATIONS

Knowledge of:

1. Practices and reporting/recordkeeping requirements of public agency retirement systems; California statutes, codes, and regulations pertaining to the administration of CalSTRS and CalPERS.

2. Practices and procedures of accounting and business mathematics, principles, and theories.

3. Data processing systems utilized for OCDE payroll and retirement systems.

4. Principles and practices of sound business communication.

5. Data gathering and analysis techniques.

6. Data processing systems utilized for OCDE payroll and retirement systems.

7. Microsoft office, including Word, Excel, PowerPoint and other related applications.

Ability and Skill to:

1. Perform duties of a lead worker in OCDE's retirement services unit.

2. Understand, interpret, explain, and apply laws, rules, and regulations pertaining to CalSTRS and CalPERS and their data and payment submission requirements.

3. Audit, analyze, interpret, balance, and process the luminous and complex data accurately and by deadline; prepare and present statistical analyses.

4. Understand and utilize technology and software provided by CalSTRS and CalPERS.

5. Analyze and solve problems and discrepancies in retirement report data and choose optimal courses of action in a timely manner.

6. Communicate clearly and effectively, both orally and in writing.

7. Prepare clear, concise, and comprehensive correspondence, reports, and other written materials.

8. Deal with sensitive and difficult situations.

9. Establish and maintain effective working relationships with OCDE and districts' management, administrators, staff, retirement system representatives, and others encountered in the course of work.

10. Must demonstrate attendance sufficient to complete the duties of the position as required.

Education, Training, and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is an associate's degree in business, accounting, or related field; and five (5) years of experience involving CalSTRS and CalPERS; or an equivalent combination of training and 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.

Physical Demands

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification perform deskwork for extended periods; read written and electronic materials; communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces. May 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 administrative problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform detailed work; work on multiple, concurrent tasks often with frequent interruptions; work under 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. The employee works under typical office conditions, and the noise level is usually quiet.