



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

**Class Code: 3107
Date Adopted: July 1, 2008
Date Revised: March 1, 2014**

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, 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 single-incumbent lead classification responsible for providing technical guidance to OCDE's retirement services staff and for performing difficult, detailed calculations, and record-keeping activities.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Oversees and performs the preparation of monthly retirement report data that is submitted to the State Teachers Retirement System (STRS) and Public Employees Retirement System (CalPERS); assists unit supervisor in ensuring mandated timelines and submission deadlines are achieved; ensures retirement payment dates are met.
2. Produces the monthly STRS/CalPERS deadline calendars for distribution; performs auditing and balancing of selected retirement reports produced by unit staff; resolves discrepancies in reports to ensure correct employer and employee retirement contributions are paid.
3. Oversees and prepares appropriate fund transfers, deposits for district charges, abatements, and applicable Countywide summary reports for STRS and CalPERS retirement plans; sets up worksheets for balancing PERS and STRS transfers; ensures remittance payments to STRS and CalPERS offices by scheduled deadlines.
4. Assists retirement services unit supervisor and IT programmers with system design, changes, modifications, enhancements, and testing of all retirement programs; assists in enhancing the production of retirement reporting through database maintenance; assists in automating processes to eliminate manual reports and recordkeeping.
5. Assists client districts' employees with problem resolution in the areas of service credits, salary overpayments, retroactive payments, and refunding of mandatory contributions; makes payroll adjustments as needed.

ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

6. Conducts training for school district staff in the areas of retirement and payroll reporting; assists districts in the implementation of special retirement benefit programs and coordinates reporting requirements with the respective retirement system; assists unit supervisor in conducting training for newly hired staff in the retirement unit; explains all applicable rules, laws, government codes, and education codes pertinent to the processing of retirement data reports; trains staff on use of automated and online systems.
7. Serves as backup in the absence of the Unemployment Insurance Claims Specialist or Payroll Services Specialist as needed or requested.

QUALIFICATIONS

Knowledge of:

1. Practices and reporting/recordkeeping requirements of public agency retirement systems; California statutes, codes, and regulations pertaining to the administration of STRS and CalPERS.
2. Practices and procedures of accounting and business mathematics.
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.

Ability 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 STRS 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 STRS and CalPERS.
5. Analyze and solve problems and discrepancies in retirement report data.
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 management, accounting, or a related field; and three years of technical payroll/retirement system experience involving the State Teachers Retirement System (STRS) and the Public Employees Retirement System (PERS); 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. 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 sit, walk, and stand; talk or hear, both in person and by telephone; use hands repetitively to finger, handle, feel, or operate computers and standard office equipment; reach with hands and arms from the waist to at or above shoulder level; bend, stoop, push, pull, grasp, squat, kneel, and twist to open file cabinet drawers, and lift up to 20 pounds from ground, waist, and chest level. Travel over uneven terrain that may include gravel or dirt, carry materials on stairs; some locations may have stairs and will not have elevators.

Specific vision abilities required by this job include close vision, color vision and the ability to adjust focus.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret detailed and complicated data, information, and documents; analyze and solve problems; use math and mathematical reasoning; perform highly detailed work on multiple, concurrent tasks with constant interruptions under intensive deadlines; and interact with managers, employees, retirement plan administrators, and others 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. The employee works under typical office conditions, and the noise level is usually quiet.