Retirement PlanSystems Analyst - DRAFT

Exhibit-F

Class Code	FLSA Status	EEO-CAT	Represented Status	Salary Grade	Effective Date	Resolution #
293	Exempt	EEO 2 – Professional	AFSCME	06	04/242024	24-007

DEFINITION: ~~Under general supervision, position is responsible for providing professional support activities; calculating retirement benefits, processing retirement payroll, reviewing/analyzing retirement applications, assisting with investment projects and monthly investment activities, writing memos; and may provide group and one-on-one retirement planning, and counseling to current employees and retirees.~~
Under general direction, performs administrative support to moderately complex analytical work providing ~~members~~Retirement Plan participants with information concerning their ~~pension~~retirement benefits ~~and planning for retirement~~; ~~to~~ assisting ~~members~~Retirement Plan participants with the processing of ~~pension~~retirement-related forms, resolving any related problems, and understanding and applying applicable rules and regulations

Incumbents in this classification are experienced--level analysts responsible for performing the full range of duties related to the ~~r~~Retirement ~~program~~Plan. The Retirement ~~System~~Plan Analyst is distinguished from the Retirement ~~System~~Plan Associate Analyst in that the latter is the emerging experienced level responsible for learning and implementing processes, procedures, and regulations related to ~~pension~~retirement benefits and program s. This class is distinguished from the next higher level of Senior Retirement ~~System~~Plan Analyst in that the latter works with greater independence and is responsible for assignments of greater complexity and is a professional level classification.

There are four (4) levels within the Retirement ~~System~~Plan Analyst series, which are distinguished from one another by the technical complexity of the assigned duties and the level of discretion and independent judgment exercised.

Positions in the series are flexibly staffed to meet the needs of the ~~District~~Retirement Plan. Positions at the emerging experienced and the experienced levels are normally filled by advancement from the entry-level and promotion is subject to the following: (i) management affirmation that the incumbent is performing the full range of duties assigned (ii) after gaining requisite experience and demonstrating proficiency which meets the minimum qualifications of the next higher-level classification.

REPRESENTATIVE FUNCTIONS may include, but are not limited to the following:

- Performs the initial c~~C~~alculat~~es~~ion of retirement benefits, reviews related materials, work histories, and retirement ~~alternatives~~ options for employees ~~for review by Retirement System Administrator or Manager~~.
- Supports activities related to disability retirement including the collection and dissemination of information from applicants, doctors, attorneys, and related parties; assigns cases to medical examiners; and reviews medical reports to ensure compliance with Retirement Plan rules.
- Prepares memoranda, reports, and analyses for the Retirement Board ~~presentations~~.
- ~~and m~~Makes occasional presentations to the Retirement Board.
- ~~Assists Retirement System Manager in monitoring of investment managers and transferring funds between investment managers.~~
- ~~Assists Retirement System Manager in preparing annual Financial Statements, such as balancing and interpreting reports from investment managers and our bank.~~
- ~~Assists in the preparation and monitors Department Budget.~~
- Compiles, reviews, audits, and verifies demographic data of~~n employees and retirees~~participants ~~used in the preparation of the actuarial valuation~~.
- Works independently on ~~complex~~ special ~~department~~ projects.
- Assist in the P~~p~~repar~~es~~ation ~~and runs the entire~~ of the annual tax documents ~~1099 process (reporting, balancing and systems interface)~~.
- Documents and updates procedures, supports compliance and analysis activities.
- Inputs retiree data into Human Resources Information System.
- Provides assistance, ~~in input,~~ research, and troubleshooting of ~~payroll system~~ participant-level issues~~errors~~.

Retirement ~~Plan~~Systems Analyst

- ~~May be required to temporarily replace or act in the position of the Retirement System Administrator.~~ Performs related duties as required.

MINIMUM QUALIFICATIONS

Knowledge of: Principles and practices of a public defined benefit plan. ~~Acceptable knowledge of Human Resources and basic principles and practices of payroll processing, techniques~~; methods and techniques for data analysis including researching, proofing, evaluating, gathering, organizing, and arranging data ~~Knowledge of techniques of for data analysis,~~; principles and practices of record keeping and confidentiality. ~~;~~ ~~a~~Advance-level command ~~computer~~ of business software programs for spreadsheets~~,~~ and word processing~~;~~; principles and practices of human resources, accounting, and payroll processing; techniques for providing a high level of customer service by effectively working with the Retirement Plan participants, contractors, and District staff.~~ at an advanced level.~~ ~~Knowledge of principles and practices of human resources, accounting, and payroll processing is desirable.~~

Ability to: Communicate effectively both orally and in writing; deliver oral reports articulately and clearly at open public Retirement Board meetings; formulate answers to questions and concerns from the Retirement Board, District employees, other Retirement Plan participants, and the general public succinctly in an unscripted manner for the public record; understand and analyze data; prepare spreadsheets on an advanced level, write clear and concise reports, memoranda, policies, correspondence, and educational materials; establish and maintain effective relationships with those contacted in the course of work using principles of excellent customer service.

~~and establish and maintain cooperative relationships with management, employees, retirees, and representatives and participants from a wide variety of groups and organizations using principles of excellent customer service.~~

Education: Equivalent to a bachelor's degree from an accredited college or university with a major in ~~f~~Finance, ~~a~~Accounting, ~~b~~Business ~~a~~Administration, ~~p~~Public ~~a~~Administration, or a related field.

Experience: ~~A minimum of f~~Four (4) years of professional level experience in ~~r~~Retirement ~~a~~Administration, ~~Hh~~uman ~~Rr~~esources, ~~Ff~~inance or ~~Pp~~ayroll. Demonstrated experience in one or more of the following areas: administering defined-benefit plans, payroll, human resources/benefits, finance, or accounting. ~~Additional years of experience beyond the minimum may be considered in lieu of the required education, on a year for year basis.~~Two (2) years of experience as Retirement Plan Associate Analyst or an equivalent position may be substituted for two (2) years of required education.

License & Certification(s): None.

Physical Requirements: Must maintain the physical condition necessary to: (1) perform tasks in an office setting operating a personal computer, keyboards, and other peripheral equipment; (2) possess physical mobility in order to transport oneself expeditiously within and between District facilities.

Special Requirements: Must be willing to occasionally work outside regular business hours and travel between the various District facilities if required.

Established Date: 04/27/2016 Res. #16-017
Revision Date: