



Alameda Contra Costa Transit District Classification Specification

Retirement ~~Plan~~Systems Assistant ~~Analyst~~ - DRAFT

Exhibit-G

Class Code	FLSA Status	EEO-CAT	Represented Status	Salary Grade	Effective Date	Resolution #
041	Non-Exempt	EEO 6 – Administrative Support	AFSCME	03	04/24/2024	24-007

DEFINITION: Under general supervision, incumbents in this position receive training and learn policies and procedures and specific methods and protocols specific to the Retirement department. and perform routine administrative support work such as answering questions, counseling retiring District member employees, processing retirement benefits and beneficiary payments; assist members Retirement Plan participants by researching retirement benefits for active, deceased, deferred or otherwise inactive members in resolving routine simple inquiries, dispatch and triage incoming requests. This is the entry and trainee level of the series. Incumbents work under close supervision and are given direct and detailed supervision with frequent review of the work. As incumbents gain the necessary skills and knowledge, work is performed with greater independence. Incumbents in this classification RPlan apply considerable interpersonal skills in responding to requests for information concerning the retirement process and benefits, perform preliminary pension calculations, and may participate in retirement planning and education workshops.

~~Under general supervision, performs a variety of clerical and administrative tasks in support of the District's retirement program.~~

There are four (4) levels within the Retirement SystemPlan 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 and (iii) learning to mitigate risks associated with procurement methods.

~~**DISTINGUISHING CHARACTERISTICS:** Incumbents in this class perform a variety of clerical and administrative tasks in support of the District's retirement program, apply considerable interpersonal skills in responding to requests for information about retirement benefits, perform preliminary pension calculations, and may participate in retirement planning and education workshops.~~

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

- ~~• Reviews work histories to identify qualifying periods to be included in retirement benefit calculations.~~
- Responds orally and in writing to telephone, written, and walk-in inquiries from current and potential retirees regarding retirement issues, and investigates and resolves a variety of routinesimple retirement related issues.
- ~~• Prepares and/or reviews the accuracy of the retiree's payroll.~~
- Provides general information and assistance to employees completing their retirement applications.
- Prepares and distributes informational materials to retirees and potential retirees and may participate in retirement planning and education workshops.
- Performs clerical and administrative functions of the office including answering phones and maintaining paper and computerized files and databases.
- Inputs data and creates and/or modifies spreadsheets and data collection templates.
- Prepares and distributes memoranda, letters, agenda, and related documents and reports.
- Performs related duties as required.

MINIMUM QUALIFICATIONS

Knowledge of: ~~Business math (+/-x%); s~~ Learn S standard business software including spreadsheets and word processing programs; business English usage; the principles of paper based and computerized record keeping; ~~k~~ knowledge of retirement and defined-benefit pension systems; ~~retirement planning,~~ benefit administration



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Retirement PlanSystems Assistant Analyst

processes, and procedures is desirable; techniques for providing a high level of customer service by effectively working with the Retirement Plan participants, contractors, and District staff.

Ability to: Review and analyze work histories; perform retirement benefit calculations; investigate and resolve retirement related issues; communicate information in a clear, concise, and effective manner; communicate effectively with retirees, employees, and the public, both orally and in writing, maintain paper and computerized records, files and databases; operate standard office machines; learn to create and modify spreadsheets and templates; and type accurately on a keyboard; establish and maintain effective working relationships with those encountered in the course of work using principles of excellent customer service.

Education: Graduation from high school or has attained a General Education Diploma (GED), California High School Proficiency Certificate or equivalent. Equivalent to completion of an associate degree from an accredited college with course work in business, accounting, public administration, sociology or a related field. Additional years of experience may be substituted for education on a year-for-year basis.

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Experience: Equivalent to Two (2) years of experience in an employee benefit, payroll, accounting, human resources, retirement program administration environment, administrative/clerical, customer service position or a related field.

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 travel between District locations.

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

Established Date: 07/14/1999, Res. # 1096
Revision Date: