



**Alameda Contra Costa Transit District  
Classification Specification**

**Deputy Executive Officer Retirement Plan - DRAFT**

Exhibit- A

Class Code	FLSA Status	EEO-CAT	Represented Status	Salary Grade	Effective Date	Resolution #
TBD	Exempt	EEO1 Officials/Administrators	Unrepresented	13	12/11/2024	24-029

**DEFINITION:** Under administrative direction, performs highly responsible, professional work for the District's Retirement Plan; assists in planning, organizing, administering, and evaluating the day-to-day operations of the Retirement Department. This classification reports directly to the Executive Officer Retirement Plan and serves as the department head in their absence. The incumbent assists in providing administrative oversight and policy direction to the department. The class requires a high-level of administrative skill, knowledge, and ability, and demonstrated leadership. Incumbents exercise considerable initiative, judgment, discretion, and the ability to make independent decisions within established policies and procedures set forth by the Executive Officer, the Retirement Board, and federal, state, and local regulations.

This classification is distinguished from the Executive Officer in that the latter has overall administrative management responsibility for the District's Retirement Plan functions, activities, and staff. This is an unrepresented at-will classification.

The AC Transit Employees' Retirement Plan is administered by the Retirement Board. The Retirement Board sets policy for the Retirement Plan's day-to-day operations and the investment and disbursement of Retirement Plan assets.

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

- Assists with planning and implementing the strategic direction for the department; assists the Executive Officer in establishing and implementing departmental goals, policies, priorities, procedures, and processes.
- Plans, organizes, administers, and evaluates the day-to-day operations of the department through multiple levels of management and supervision.
- Manages assigned staff including selecting employees, providing for their training/professional development, being responsible for staff morale, productivity, and discipline, directing work of subordinates, evaluating work performance, and resolving personnel issues.
- Coordinates standards for implementation and ongoing compliance with mandated federal and state legislative policies across divisions.
- Assists in identifying long- and short-range retirement planning needs and resource requirements; develops policies and programs to meet the District's needs.
- Assists in providing direction, input, and coordination among internal and external stakeholders; works collaboratively and effectively with peers, staff, departments, and boards to maintain and improve the District's Retirement Plan.
- Contributes to the analysis of investment proposals and oversees consultants for various services, in coordination with the Executive Officer.
- Oversees the preparation of and independently prepares reports, analyses, and documents for retirement plan related matters; develops findings, alternatives, and recommendations on a wide variety of retirement issues and policies for the Retirement Board.
- Participates in contract negotiations for actuarial, professional, and other services.
- Informs the Retirement Board of developments in the investment, actuarial, accounting, retirement, and employee benefit fields and the impact to the management of the Retirement Plan.
- Oversees the application process for retirement benefits.
- Oversees the proper maintenance of the Retirement Plan's records.
- Analyzes and makes recommendations to the Retirement Board with regard to federal and state laws and regulations concerning retirement, accounting, investment, or other relevant matters; analyzes and interprets new and changes to existing legislation that may affect the retirement plan for Retirement Board review.
- Oversees the preparation of the Retirement Board meeting agenda and minutes.
- Provides educational outreach to District employees on the Retirement Plan.



## Deputy Executive Officer Retirement Plan

- Assists and contributes to the administration of the annual budget and expenditures for the Retirement Plan and the department.
- Assists in maintaining liaison with actuaries and other relevant partners.
- Assists in consultations with investment counsels, attends meetings and conferences, and reports, as appropriate, to the Retirement Board.
- Provides information to the District on retirement system matters; answers retirement-related questions.
- Provides review of calculated retirement benefits for approval by the Retirement Board.
- Prepares written materials including informational pamphlets and handbooks, explaining, and interpreting retirement system laws, ordinances, policies, and procedures.
- Coordinates assigned activities with other departments and outside agencies and organizations.
- Confers with and advises subordinates regarding administrative policies and procedures, and retirement plan related issues.
- Negotiates and directs the administration of contracts for the provision of financial services.
- Monitors changes in policy and regulations related to finance-related matters; evaluates their impact upon District activities and provides for the development and implementation of required policy and operational modifications.
- Collaborates and exercises considerable discretionary judgment in determining administrative and management strategies for the department.
- May be required to temporarily replace or act in the position of the Executive Officer and may be required to perform some or all of the Executive Officer's essential functions in such situations.
- Performs related duties, as required.

### **MINIMUM QUALIFICATIONS**

**Knowledge of:** Principles and practices of public retirement systems including state and federal laws, regulations, and pronouncements relating to or affecting pension systems, social security, survivors and disability insurance; principles and practices of fiscal and actuarial management; investments and portfolio management; accounting principles, theory, and statistical analysis; automated information systems; public meeting laws including the Brown Act; administrative principles and practices, including the development of goals and objectives, program and work organization and evaluation; principles and methods of supervision including training, motivation, team building, and conflict resolution; principles and practices of budget preparation, administration and monitoring; techniques, tools, and principles of project management; advanced statistical methods, the principles, methods, and practices of project controls and business analytics; principles and practices of quality assurance and quality control; proficiency in English usage, grammar, spelling, vocabulary, and punctuation; principles and procedures of record-keeping, technical report writing, and preparation of correspondence and presentations; modern office practices and methods, including computer equipment and software programs relevant to the work performed, software for project management and control, word processing, spreadsheets, databases, and presentation at the advanced level of proficiency; pertinent District functions, policies, rules, and regulations, and labor agreements, applicable governmental regulations, laws, and legislation; techniques for providing a high level of customer service by effectively working with the Retirement Plan participants, contractors, and District staff.

**Ability to:** Understand, interpret and apply provisions of federal, state and local regulations pertaining to the administration of retirement policies and programs, and public agency meeting and public records laws; analyze policy issues, develop program objectives, implement and evaluate procedures; review and draft legislation for recommendation to the Retirement Board; negotiate contract terms and fee schedules for professional services; effectively communicate orally and in writing; counsel people on Retirement Plan-related matters; prepare and interpret financial and statistical reports; negotiate contract terms and fee schedules for professional services; establish and maintain effective relationships with those contacted in the course of work using principles of excellent customer service.



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**Education:** Equivalent to a bachelor's degree from an accredited college or university with a major in finance, accounting, business administration, public administration, or a related field.

**Experience:** Equivalent to seven (7) years of increasingly responsible professional experience in public retirement, benefits, or personnel administrative position which included counseling employees on retirement benefits and obligations, working with or membership on a retirement policy oversight board or committee and interpreting and applying retirement law, rules and regulations; three (3) years supervisory experience in the above functions.

**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:**

**Revision Date:**