



Job Description

POSITION CODE: 704
Classified Group: CSEA
Salary Range: 31
Work Days: 261
Page 1 of 3

POSITION TITLE: Retirement Specialist

DEFINITION: Under general ~~direction~~ **supervision**, analyzes, prepares, and performs specialized and complex work relating to compliance with and reporting information to both the **California State Teacher's Retirement System** (CalSTRS) and **the California Public Employee's Retirement System** (CalPERS); monitors other retirement program contributions to ensure complete and accurate reporting; performs complex accounting, auditing, and reconciliation duties related to payroll and benefits; ~~performs related duties as assigned~~; **Required to conduct 8 hours of related Position Specific Duties training provided to Payroll Technician II position; the training will be required to be tracked and recorded each month by the Payroll Manager.**

DIRECTLY RESPONSIBLE TO: Manager, Payroll

DUTIES AND RESPONSIBILITIES: (Any one position may not include all of the duties listed; the listed examples do not include all duties and responsibilities which may be found in positions within this classification.)

1. Compiles information from payroll and benefits records for monthly, quarterly, annual or special reporting to CalSTRS, CalPERS, and other retirement plans.
2. Reviews data for completeness and accuracy, making adjustments and/or corrections as needed.
3. Reviews, interprets, and disseminates information on retirement law changes.
4. Makes recommendations for changes in Payroll, Benefits, and/or Human Resources practices to ensure processes and procedures are in compliance with retirement laws and regulations.
5. Confers with and obtains information from CalSTRS and CalPERS to resolve problems or implement changes.
6. Prepares and maintains manuals, procedures, and reporting information.
7. Makes recommendations for policy and/or procedure changes.
8. Serves as the district liaison to CalSTRS, CalPERS, and the Sacramento County Office of Education (SCOE) on retirement reporting.
9. Attends meetings, trainings, and workshops as needed to have current and correct information on retirement plans and reporting.
10. Serves as a resource for employees with questions regarding their retirement and for district staff regarding budgeting and negotiations.
11. Assists with the research, collection, and compilation of data for other payroll or benefits-related purposes, projections or estimates.
12. May assist in the design, development, testing, and implementation of information system changes related to payroll and/or benefits.
13. May assist in the analysis of claims and litigation regarding workers' compensation.
14. May perform as a team or project lead on special projects as assigned.
15. **Performs related work as required.**

QUALIFICATIONS

Education and Experience:

Any combination of training, education and/or experience equivalent to an Associate (two-year) degree **from an accredited college or university** and three years of increasingly responsible experience in benefits, payroll and/or human resources. **Possession of a four-year degree from an accredited college or university may be substituted for experience.**

Knowledge, Skills, and Abilities:

- Knowledge of accounting and statistical principles, procedures, and terminology
- Knowledge of pertinent retirement laws and principles
- Knowledge of payroll procedures and policies
- Knowledge of computer-based accounting systems
- **Knowledge and skill in the use of a desktop computers and specialized assorted software programs**
- Knowledge of **modern office practices**, procedures, and equipment/machines, including calculator, copier, computer, and printer
- ~~Telephone techniques and etiquette.~~
- Ability to analyze, read, learn, interpret, and apply complex federal and state laws and district policies and procedures
- ~~Ability to analyze and interpret laws, policies, and procedures~~
- Ability to analyze and interpret fiscal records and documents
- Ability to analyze situations and adopt an effective course of action
- Ability to prepare accurate and complete financial summaries and reports
- Ability to detect and correct **discrepancies**, errors, and omissions **on all received paperwork**
- Ability to perform research and compile information from a variety of sources
- **Ability to** communicate effectively both orally **verbally** and in writing **with all levels of district staff and external vendors** Correct English usage, grammar, spelling, punctuation and vocabulary.
- **Ability to understand and follow both oral verbal and written instruction** directions
- **Ability to work independently, with minimum direction, and make decisions within the framework of established guidelines**
- **Ability to work effectively with all levels of district staff and external vendors**
- Interpersonal relations skills using tact, patience, and courtesy
- **Ability to establish and maintain accurate records and maintain a confidentiality of sensitive and privileged information obtained in the course of work**
- Ability to plan and organize work to meet established schedules and deadlines
- **Ability to perform moderate mathematical functions (i.e. add, subtract, multiply, and divide quickly and accurately)**
- ~~Maintain consistent, punctual, and regular attendance~~

WORKING CONDITIONS

Work Environment:

- Indoor office environment
- Moderate noise
- Work near moving mechanical parts
- Continuous contact with staff and frequent interruptions

Typical Physical Characteristics: (with or without use of aids; consideration will be given to reasonable accommodation).

- **Inspect** Sufficient vision to see small print, read, prepare documents and **other written materials with fine print** reports and view a computer monitor
- **Communicate to exchange information in person, small groups**, sufficient hearing to hear normal and/or on the telephone conversations
- **Operate office equipment requiring repetitive hand movement and fine coordination** sufficient dexterity to write, operate telephone, computer and other business machines
- **Move about the facilities to conduct work including walking, standing, remaining seated**, sufficient mobility to reaching with arms and hands overhead, above the shoulders, and horizontally to store or retrieve files and records (with or without the use of aids), **stooping, kneeling, crouching, and remaining in a stationary position for long periods of time**
- **Transport, lift, or move files and other objects weighing up to 30 pounds**

Other Characteristics:

- Willingness and Ability to work overtime **additional hours** with minimal notice to complete processing of critical tasks.

This job description is not a complete statement of essential functions and responsibilities. The district retains the discretion to add or change typical duties of a position at any time.

Board Approved: 2/24/2016
Revised: TBD