

Title: Pension Benefit Manager
PG: 56
Status: Civil Service
Position Reports to: Lakeland Retirement System Director
Department: Retirement Services

Class Code: 2245
Date: 09/08

GENERAL DESCRIPTION OF CLASS:

This is responsible supervisory work in management of the Lakeland Retirement system. Work involves providing direction and participating in activities required to maintain the City of Lakeland Retirement System. Work includes the securing of interpretations of various federal, state and local legislation, as well as rules, regulations policies and procedures established by the City administration and the promulgation of rules and procedures emanating from the Pension Board. Work is performed with some considerable independence and is reviewed through conferences, reports and evaluation of results obtained.

ESSENTIAL FUNCTIONS:

1. Assist the Executive Director in all facets of the administration of the Employees' Pension Plan, Defined Contribution Plan, Police Officers' Supplemental Plan, Firefighters' Supplemental Plan, Deferred Retirement Option Program (DROP), the Deferred Compensation Plan and FICA substitution plan.
2. Assist the Executive Director in planning and directing all facets of the retirement system.
3. Supervises employees engaged in the administration and maintenance of pension benefit programs; responsible for hiring, training, and appraising employees.
4. Assist in the development of operational goals and guidelines for the pension systems policies/procedures to include pre-retirement counseling, retirement benefit calculation, plans compliance, and records maintenance.
5. Develops and modifies policies and programs utilizing knowledge of best practices.
6. Review legislation affecting retirement benefits, data concerning best practices among similar organizations in order to comply with legal requirements, and evaluate competitive benefit programs.
7. Manages the implementation of approved new plans and plan modifications by overseeing the preparation of announcement material, booklets, and other media for communicating new plans to employees.
8. Conducts employee meetings and arranges for enrollment of employees in optional plans.
9. Conducts employee benefit seminars for local personnel.
10. Revises and reissues all communications material on benefits from time to time.
11. Coordinates all Board of Trustee meetings – Employees' Pension Plan, Police Officers' Supplemental Pension Plan and Firefighters' Supplemental Pension Plan. Includes oversight of the following: preparation of meeting agendas in compliance with the Florida Sunshine Law, distribution of meeting back-up material to the Board of Trustees, and preparation and distribution of meeting minutes.
12. Assists the director in preparing material in collective bargaining sessions.
13. Assist the Director in the negotiation of contracts with outside providers and be responsible for the maintenance of system contracts files for investment management, performance monitors, legal, actuarial and custodial services.
14. Oversees the annual City of Lakeland Retiree audit process and the annual retiree population audit.
15. Coordinate and direct activities with actuaries, auditors and legal representatives in the preparation of state mandated annual reports of the various pension plans sponsored by the City.
16. Serves as the division lead in implementing People Soft Human Resource Management System modules, annual upgrades and other technically related projects.
17. Responsible for the on-going updates to the operational requirements of the System, web pages relating to City of Lakeland retirement, materials presented to employees in orientation or workshops.
18. Responsible for the preparation of state reports and related correspondence from the division of retirement regarding police and firefighter plan members.

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19. Responsible for maintaining all Access databases, Excel Spreadsheets, and Word Mail Merge and serve as the technical upgrade liaison for the System.
20. Responsible for the creation and maintenance all PeopleSoft Queries for System, and the creation and maintenance of third party output files from PeopleSoft for the System, and all; software applications to evaluate asset holdings in Employee, Police and Fire Pension Funds.

ADDITIONAL RESPONSIBILITIES:

1. Performs related work as required.

KNOWLEDGE, SKILLS & ABILITIES:

1. Considerable knowledge of theory, principals and practices of retirement system structure and management.
2. Considerable knowledge of various forms of employee benefit programs, as well as operational knowledge of actuarial principals, social security and tax laws.
3. Considerable knowledge of public personnel management and of local government organization and procedures.
4. Knowledge of federal, state, and local laws, City ordinances, and other applicable regulations, standards and requirements, as well as court and regulatory body decisions governing or related to pension system management including Florida Statutes Chapters 112, 175 and 185.
5. Thorough knowledge of investment principals, practices and terminology.
6. Ability to plan, organizes, develop and effectively administer programs and related activities to establish and enforce federal, state and City statutes, ordinances and regulations.
7. Ability to exercise judgment and discretion in the development, implementation and maintenance of the City of Lakeland Retirement System.
8. Strong analytical skills and a thorough knowledge of plan designs including the ability to interpret benefit contract language. Ability to understand, evaluate and make judgment on proposals.
9. Skill in utilizing a variety of computer applications to include Excel, Power Point, Crystal and Access.
10. Skill in preparing written reports, research and survey data, and in oral communications.
11. Skill in establishing and maintaining effective working relationships with co-workers, employees, retirees and the general public.
12. Ability to speak and make presentations to groups of various sizes.
13. Ability to conduct department activities with competence, initiative and professionalism.

WORKING ENVIRONMENT/CONDITIONS:

Requires sedentary work that involves walking or standing some of the time, exerting up to 10 pounds of force on a recurring basis, and routine keyboard operations.

The job risks exposure to no significant environmental hazards.

The job requires normal visual acuity, and field of vision, hearing, speaking, color perception, sense of smell, depth perception, and texture perception.

QUALIFICATIONS (EDUCATION, TRAINING, AND EXPERIENCE):

1. Graduation from an accredited four (4) year college or university with major course work in human resources, business or public administration, or related field.
2. Eight (8) years of human resource related experience, four (4) of which should be experience in the development and administration of pension related programs such as defined benefit plans, defined contribution plans and deferred compensation plans, retirement health savings plans.

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3. Two (2) years of supervisory experience.
4. An equivalent combination of education and experience that is determined to be directly related to the foregoing specific requirements may be substituted.

SPECIAL REQUIREMENTS:

1. Must possess and maintain a valid home telephone number.
2. Must possess and maintain a valid state of Florida driver's license.
3. Must be able to attain CPPT certification through the Florida Public Pension Trustees Association within two (2) years of employment.
4. May be required to work overtime, or alternate hours, as necessary for the efficient operation of the department. Position may be designated as Mission Critical by Department Director.