

Title: Pension Benefits Assistant
PG: 38
Status: Civil Service
Position Reports to: Pension Benefits Manager
Department: Civil Service and Retirement

Class Code: 6093
Date: 09/08

GENERAL DESCRIPTION OF CLASS:

An employee in this classification performs duties involved in the daily administration of the City's pension benefits program to include retirement and deferred compensation. Work involves working knowledge of pension benefits, policies and procedures. An employee in this classification initiates the commencement of pension benefits, maintains files of pension plan history, pension data, correspondence, reports and forms, and initiates record keeping and retrieval methods in compliance with governmental regulations. Work is performed under the general supervision of the designated supervisor and is reviewed through conferences, reports and evaluation of results obtained.

ESSENTIAL FUNCTIONS:

1. Assist in the administration of the employee pension systems, which include the Employee Pension Plan, Police Officer's Supplemental Plan, Share Plan, Firefighter's Supplemental Plan, Deferred Retirement Option Program (DROP), Defined Contribution Plan and Deferred Compensation Plan.
2. Meets with current employees and retirees to explain retirement or termination options, including the Deferred Retirement Option Program (DROP), and the Defined Contribution Plan.
3. Educates employees in understanding of benefit programs by regularly generating communication and counseling employees/dependents on retirement benefits and aspects of the Deferred Compensation Plan.
4. Assist in the communication of the various policies, procedures, laws, standards and government regulations that apply to the Plans.
5. Assist in the implementation of new benefit programs; arranges and conducts employee information presentations and enrollments. Conducts new employee orientation to ensure employees gain an understanding of the City of Lakeland pension systems and deferred compensation program and the enrollment provisions.
6. Compute and initiate the commencement of pension benefits. Maintains files of pension plan history, pension data, correspondence, reports, and forms. Initiates record keeping and retrieval methods in compliance with governmental regulations.
7. Utilize people soft or other applicable software application to compute pension benefit prepares appropriate forms and documentation for retirement application, the maintenance of the records, files and other information pertinent to the Plans.
8. Respond to pension related inquiries and complaints to ensure quick, equitable, and courteous resolution.
9. Assists in the design and distributes materials for benefit orientations, and summary plan descriptions.
10. Assist in the preparation of the bi-weekly reports notifying the State of Florida of new hires and notifying the Clerk of Courts of terminating employees with Child Support Garnishments.
11. Attends meetings for employees that have applied for Long Term Disability pension benefits and provides explanation of pension benefits.
12. Conducts exit interviews to inform employees of their pension status and provide information of payout method, vesting regulations, etc. Update and provide paperwork and follow the steps to coincide with payroll for termination or retirement.
13. Assist in the maintenance of necessary computer databases to facilitate statistical analyses and computer files of essential personnel and pension related data.
14. Serves as department liaison for the City of Lakeland Association of Retirees in absence of Pension Benefit Administrator.
15. Assists in the development and implementation of the pre-retirement planning seminars.
16. Serve as recording secretary for Employees Pension Board, PORF Board and Fire Board (Schedule meetings, prepare agenda and minutes, make travel arrangements for board members.

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17. Update designs, and prepare paper work for employee orientation sessions. Conducts the presentation for the new hires and do the follow-up work and input into People Soft.
18. Enroll and record investment election in the Hartford data base for the employees.
19. Assist in the preparation and completion of annual audit for retirees and vested employees

ADDITIONAL RESPONSIBILITIES:

1. Prepares correspondence and maintains detailed documentation.
2. Performs related work as required.

KNOWLEDGE, SKILLS & ABILITIES:

1. Knowledge of principals, practices, systems, processes, methods and legal issues pertaining to pension plan administration.
2. Knowledge of report and record maintenance principals and practices.
3. Knowledge of applicable computer software and usage and of modern office management practices, procedures, and equipment.
4. Knowledge and understanding of Human Resource Information System (HRIS) and related software.
5. Demonstrated analytical skill and ability in dealing with new and complex problems and issues, and in counseling and resolving questions raised by employees and others on pension benefit matters.
6. Ability to understand and apply a substantial number of specialized and technical provisions of ordinances, rules and regulations, and policies and procedures in the administration of the City's pension plans.
7. Ability to set up and maintain accurate pension plan records and to make a wide variety of arithmetical calculations as to eligibility, tax liability, and cost of living adjustments.
8. Ability to counsel employees and prospective retirees on a variety of options and their consequences for both the employee and his/her dependent.
9. Ability to organize, assist in the development, and effectively administer pension system programs and related activities to establish and enforce federal, state and City statutes, ordinances and regulations.
10. Ability to speak and make presentations to groups of various sizes. Ability to communicate effectively both verbally and in writing.
11. Ability to deal with employees and retirees in a courteous and respectful manner to help resolve concerns and misunderstandings by providing polite and appropriate information and explanation consistent with established regulations and policies.

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 dusts, pollen and bright/dim light.
The job requires normal visual acuity, and field of vision, hearing, speaking, color perception, sense of taste, sense of smell, depth perception, and texture perception.

QUALIFICATIONS (EDUCATION, TRAINING, AND EXPERIENCE):

1. Associate's degree with course work emphasis in Human Resources, Public Administration or related field.
2. Three (3) years human resource experience (benefits administration, pension calculations).
3. An equivalent combination of education and experience that is determined to be directly related to the foregoing specific requirements may be substituted.

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SPECIAL REQUIREMENTS:

1. Must possess a valid state of Florida driver's license.
2. Must maintain a valid telephone number.
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.