

**MENDOCINO COUNTY GOVERNMENT  
CLASS SPECIFICATION**

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<b>CLASS TITLE:</b>	<b>RETIREMENT COORDINATOR</b>	<b>CLASS CODE: 0050</b>
<b>DEPARTMENT:</b>	<b>RETIREMENT</b>	<b>FLSA STATUS: N</b>
<b>REPORTS TO:</b>	<b>RETIREMENT ADMINISTRATOR (OR RETIREMENT BOARD)</b>	<b>Rev. 12/07</b>
<b>CIVIL SERVICE:</b>	<b>YES</b>	<b>BARGAINING UNIT: CONFIDENTIAL</b>

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**JOB SUMMARY:**

Under general direction, plans, organizes, supervises and coordinate the work of staff in the Retirement office including the maintenance and control of records, computation of benefits, counseling of members, interpretation and application of regulations and laws governing retirement benefits; provides work direction to subordinates; and performs related duties as required.

**DISTINGUISHING CHARACTERISTICS:**

The Retirement Coordinator is the supervisory level classification. Within legal requirements and departmental policies, the incumbent is expected to demonstrate the highest degree of initiative, independent judgment and expertise in administering the full range of retirement benefit options including disability, regular and survivor benefits activities of the County Retirement System. The incumbent plans, organizes and supervises the work of the office and selects, trains, assigns, evaluates and recommends discipline. This class is distinguished from Retirement Specialist II in that the latter class performs at the journey level and does not process disability retirements or the most complex financial accounting functions for the office.

**SUPERVISION EXERCISED:**

The Retirement Coordinator supervises the Retirement Specialist Series.

**ESSENTIAL JOB FUNCTIONS:** *Duties may include but are not limited to the following:*

- Carries out supervisory responsibilities in accordance with policies, procedures and applicable laws including interviewing, hiring, training, planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.
- Provides information to and advises employees contemplating retirement on procedures for applying for benefits under the 1937 Retirement Act Law; prepares estimates of retirement benefits, including optional benefits; prepares complicated calculations for the redeposit of withdrawn or part time service; explain retirement system laws and procedures, retirement contribution rates; deals directly with active and retired members and their legal representatives on difficult or sensitive retirement issues; assists in planning and implementing programs for members; makes presentations for new employee orientation and pre-retirement workshops; represents the retirement system on inter-agency committees and project teams.
- Assigns, participates, coordinate and prioritizes work based on the nature of the work; schedules work to meet deadlines and monitors flow and quality of work; resolves problems associated with the completion of work; evaluates and establishes work priorities; performs the more difficult and responsible duties assigned to the office independently.
- Reviews work of staff for accuracy, appropriateness, adequacy, format, and compliance with pertinent laws, regulations, standards, policies and procedures and work product.
- Plans, organizes and controls records for active and retired members of the retirement system.
- Verifies member information such as contributions, interest, purchases, refunds, total service time credited and insurance coverage. Calculates benefits.
- Calculates and processes benefits and allowances for service disability, death, and deferred retirement; analyzes and interprets court orders concerning civil, probate, juvenile, spousal or community property issues and oversees the administration of such orders.
- Receives and processes applications for disability retirements; coordinates disability retirement applications with applicant, department, medical professionals, attorneys, and the County medical advisor when appropriate. Prepares confidential disability retirement application packages for the Retirement Board, which contains medical information. Reports findings in support or controvert of disability retirement claims; coordinates appeals process with County Counsel and/or the Retirement Board attorney.
- Processes payroll for retirees including data entry and monitoring for accuracy. Prepares calculations to determine post retirement benefits and deductions. Applies tax laws, and computes payroll taxes.
- Interacts with custodial bank personnel, actuaries, outside auditors and other financial agencies regarding investment transactions, and activities.
- Prepares monthly agenda for the Retirement Board of Director's Meeting. Records and transcribes minutes of the

meetings.

- Monitors the status of fund participants, initiating correspondence as required for retirees affected by health insurance changes, etc.
- Presents documentation including the necessary medical legal documents to the Retirement Board. Contacts physicians, attorneys, rehabilitation specialists and applicants concerning the status of cases. Reviews physician reports to assess the need for additional information or clarification.
- Researches retirement system laws and regulations and prepares reports. Review pending legislation and remains informed of laws, legislation and regulations affecting public employee retirement plans.
- Meets with the Retirement Administrator and/or County Counsel in order to interpret certain sections of the law.
- Writes, edits, produces and disseminates newsletters, booklets, bulletins, benefit statements, and other written materials.
- Prepares correspondence regarding retirement matters to employees, retirees, actuaries, attorneys, medical professionals, outside agencies and other public retirement systems within the state of California.
- Involved in preparation of annual records; to be presented to the independent auditor chosen by the Retirement Board.
- Makes presentations providing information about the retirement system to members, retirees, County management and other participating employers.
- Works with the Retirement Administrator to prepare annual report sent to all members regarding the retirement fund.
- Researches, analyzes and compiles statistical data regarding benefit and withdrawal payment trends. Prepares of a variety of reports and correspondence.
- Enters and retrieves data from electronic data processing systems. Produces, reviews and maintains forms, files and other necessary electronic records.
- Performs other related duties as assigned

**MATERIAL AND EQUIPMENT USED:**

Personal Computer and/or Terminal

Typewriter

General Office Equipment

**MINIMUM QUALIFICATIONS REQUIRED:**

**Education and Experience:**

High school diploma or GED, supplemented with course work in accounting, business administration, economics, human resources, and/or public administration; and four years of experience performing complex administrative and financial support activities in a retirement system administered under the 1937 Retirement Act Law, including one year of experience in a lead or supervisory position; or a combination of education, training and experience, which provides the required knowledge, skills, and abilities to perform the essential functions of the job.

**Licenses and Certifications:**

None

**KNOWLEDGE, SKILLS, AND ABILITIES:**

**Knowledge of:**

- 1937 Retirement Act Law and other applicable state, federal and local ordinances, laws, rules and regulations.
- Laws and regulations related to disability retirement, divorce and property settlements, and death benefits.
- General office procedures, policies and practices, as well as thorough knowledge of computer and other general office equipment.
- Recordkeeping, report preparation, filing methods and records management techniques.
- Financial records management and general accounting procedures.
- Benefits processing and medical terminology.
- Information gathering techniques, business and legal writing formats, and interviewing techniques.
- Principles and methods of supervision.
- Office administrative practices and procedures.
- Correct English usage, including spelling, grammar, punctuation, and vocabulary.
- Methods and techniques used in researching, proofing, evaluation, gathering, organizing and arranging data.
- All computer applications and hardware related to performance of the essential functions of the job.

**SKILL IN:**

- Planning, organizing, assigning, directing, reviewing and evaluating the work of staff.
- Selecting and motivating staff and providing for their training and professional development.
- Using tact, discretion, initiative and independent judgment within established guidelines.
- Preparing clear and concise reports, correspondence and other written materials.
- Organizing work, setting priorities, meeting critical deadlines, and following up on assignments with a minimum of directions.
- Communicating clearly and effectively, both orally and in writing.
- Applying logical thinking to solve problems or accomplish tasks, to understand, interpret and communicate complicated policies, procedures and protocols.
- Using a computer terminal to enter and retrieve data and information.

**MENTAL AND PHYSICAL ABILITIES:**

- Interpret, apply and enforce laws, regulations, ordinances and policies related to retirement procedures.
- Establish and maintain effective working relationships with a variety of individuals.
- Work effectively with individuals in sensitive and stressful circumstances.
- Follow oral and written instructions.
- Perform mathematical computations.
- Write reports and correspondence.
- Maintain accurate and complete retirement records.
- Speak effectively before individuals and/or groups.
- Use electronic information equipment and specific systems as utilized in retirement and enter data accurately.
- Stands, walk, sit, use hands to finger, handle, or feel, reach with hands and arms, and speak and hear.
- Lift and/or move up to 20 pounds.

**WORKING CONDITIONS:**

- Work is performed in a normal office environment with little exposure to outdoor temperatures or dirt and dust.
- The incumbent's working conditions are typically moderately quiet.

This class specification should not be interpreted as all-inclusive. It is intended to identify the essential functions and requirements of this job. Incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification. Any essential function or requirement of this class will be evaluated as necessary should an incumbent/applicant be unable to perform the function or requirement due to a disability as defined by the Americans with Disabilities Act (ADA). Reasonable accommodation for the specific disability will be made for the incumbent/applicant when possible.