

**MENDOCINO COUNTY GOVERNMENT  
CLASS SPECIFICATION**

<b>CLASS TITLE:</b>	<b>RETIREMENT SPECIALIST I RETIREMENT SPECIALIST II</b>	<b>CLASS CODE:0051 CLASS CODE: 0018</b>
<b>DEPARTMENT:</b>	<b>RETIREMENT</b>	<b>FLSA STATUS: N</b>
<b>REPORTS TO:</b>	<b>RETIREMENT COORDINATOR</b>	<b>DATE: 12/07</b>
<b>CIVIL SERVICE:</b>	<b>YES</b>	<b>BARGAINING UNIT: CONFIDENTIAL</b>

**JOB SUMMARY:**

Under general or direct supervision, perform varied and responsible retirement counseling and operational work in accordance with Federal and State regulations particularly the 1937 Retirement Act Law, and the policies and regulations of the Mendocino County Retirement Board; performs other related duties as required.

**DISTINGUISHING CHARACTERISTICS**

The Retirement Specialist I is the entry-level classification in the Retirement Specialist series. Employees in this class receive training, are given detailed instructions in the performance of routine tasks and perform tasks that are more structured and repetitive than those assigned at the II level. As requisite skills and knowledge are developed, greater independence and the full scope of responsibility are exercised. Incumbents are expected to promote to the journey level within one to two years of successful performance; however, positions that are limited to duties of a more routine, repetitive nature may be permanently allocated at the I level

The Retirement Specialist II is the journey level classification in the series. Within legal requirements and departmental policies, the incumbent is expected to demonstrate a high degree of initiative, independent judgement and expertise in administering regular and survivor benefits activities of the County Retirement System. This class is distinguished from Retirement Specialist I in that the primary responsibility of the latter class is to learn the process and procedures necessary to support the Retirement system. This class is distinguished from Retirement Coordinator in that the latter class is responsible for planning, organizing, supervising and coordinating the work of staff in the Retirement office including oversight of the maintenance and control of records, interpretation and application of regulations and laws governing retirement benefits; and performs the more complex and difficult tasks which require in-depth knowledge of retirement processes, procedures and law such as disability retirement, death benefits, financial accounting, and retirements involving reciprocity.

**SUPERVISION EXERCISED**

The Retirement Specialist I exercises no supervision but may provide training to other staff. The Retirement Specialist II may act as a lead worker and provide training to other staff.

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

*The following duties are performed in a learning capacity for the Retirement Specialist I.*

- Interview members contemplating retirement and provide them information, ensure eligibility and advise on procedures for applying for benefits under the 1937 Retirement Act Law.
- Verifies member information such as contributions, interest, purchases, refunds, total service time credited and insurance coverage. Calculates benefits.
- Processes all documents necessary to the retirement application process in accordance with a variety of benefit laws, rules, and regulations.
- Monitors the status of fund participants, initiating correspondence as required for retirees affected by health insurance changes, etc.
- Assembles documentation including the necessary medical and legal documents to present 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. Reviews pending legislation and remains informed of laws, legislation and regulations affecting public employee retirement plans.
- Writes, edits, produces and disseminates newsletters, booklets, bulletins, benefit statements, and other written materials.
- Makes presentations providing information about the retirement system to members, retirees, County management and other participating employers.

- Researches, analyzes and compiles statistical data regarding benefit and withdrawal payment trends. Prepares a variety of reports and correspondence.
- Supports the work of the Retirement office, including counseling members contemplating retirement.
- Performs other related duties as assigned.

*In addition to the above duties, the Retirement Specialist II duties may include but are not limited to:*

- Prepares detailed estimates of retirement benefits, including optional benefits; prepares calculations for redeposit of withdrawn or part time service; explains retirement system procedures, retirement contribution rates and assists in planning and implementing programs for members.
- May represent the retirement system on inter-agency committees and project teams.
- Assists with payroll processing 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.
- Interact with custodial bank personnel, actuaries, outside auditors and other financial agencies regarding investment transactions, and activities.
- Prepares weekly claims for billings presented by vendors and employees terminating employment with the County.
- May perform as a lead worker.

**MATERIAL AND EQUIPMENT USED:**

Personal Computer and/or Terminal

Typewriter

General Office Equipment

**MINIMUM QUALIFICATIONS REQUIRED:**

**Education and Experience:**

**Retirement Specialist I:**

High school diploma or GED, supplemented with course work in accounting or business; and one year of experience performing general office duties such as typing, filing, and answering telephones; or any combination of education, training and experience that provides the required knowledge, skills, and abilities to perform the essential functions of the job.

**Retirement Specialist II:**

High school diploma or GED, supplemented with course work in accounting or business; and, two years of experience performing general office duties which must include prior experience performing administrative and financial support activities in a retirement system administered under the 1937 Retirement Act Law, or equivalent retirement system.

**Licenses and Certifications:**

None

**KNOWLEDGE, SKILLS, AND ABILITIES:**

**Knowledge of:**

- Applicable state, federal and local ordinances, laws, rules and regulations.
- General office procedures, policies and practices, as well as basic computer knowledge and other general office equipment.
- Recordkeeping, report preparation, filing methods and records management techniques.
- Financial records management.
- Office administrative and secretarial practices and procedures, such as business letter writing, etc.
- Correct English usage, including spelling, grammar, punctuation, and vocabulary.
- All computer applications and hardware related to performance of the essential functions of the job.

**Skill in:**

- 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 direction.
- 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:**

- Establish and maintain effective working relationships with a variety of individuals.
- Follow oral and written instructions.
- Write reports and correspondence.
- Speak effectively before individuals and/or groups.
- Interpret, apply and enforce laws, regulations, ordinances and policies related to retirement procedures.
- Stand, 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.

**Retirement Specialist II**—*(in addition to the above qualifications)*

**Knowledge of:**

- Working knowledge of 1937 Act (or related) public employees retirement system regulations, operations, policies and procedures.

**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.