

CLASS TITLE: RETIREMENT SYSTEM COORDINATOR

PURPOSE OF THE CLASSIFICATION: Under direction is responsible for the advanced coordination of the City of Tulsa Municipal Employee Retirement Plan (MERP) and other related retirement programs/systems, including the deferred compensation plan and performs other related assigned duties.

ESSENTIAL TASKS:

- Supervises and reviews the daily activities of staff to include: prioritizing and assigning work in data and information analysis/reconciliation/submission, retirement calculations, counseling participants regarding benefit and Plan information, customer service and claim issues, deferred compensation, and other related duties; conducting performance evaluations; ensuring staff is trained; ensuring that employees follow policies and procedures; maintaining a healthy and safe working environment; and, making hiring, termination, and disciplinary recommendations
- Supervises staff assigned to prepare and train employees on retirement plans and options including educational outreach through employee orientation and pre-retirement seminars
- Supervises the work of support staff assigned to boards and committees, specifically Municipal Employment Retirement Plan (MERP) and the Deferred Compensation Committee
- Coordinates with the Information Technology Department to develop system procedures to enhance the effectiveness of programs and processes
- Evaluates program effectiveness, establishes improvement goals and provide progress reports to management and MERP Board of Trustees
- Ensures compliance with contracts, agreements and federal regulations
- Monitors programs to determine effectiveness and presents recommendations to management
- Reviews policies and procedures related to benefit issues regularly and provides updates as needed to ensure compliance with current HR programs
- Oversees the resolution and coordination of transactions between the employee, City and vendor
- Develops and implements employee communication programs related to retirement benefits
- Administers, determines and implements program eligibility requirements
- Must report to work on a regular and timely basis

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential tasks.

QUALIFICATIONS:

Training and Experience: Graduation from an accredited college or university with a bachelor's degree in business/finance or public administration, human resources management, or a closely related field and four (4) years of responsible experience in public or private pension/retirement plan administration, with previous supervisory experience preferred; or an equivalent combination of training and experience per Personnel Policies and Procedures, Section 128.

Knowledge, Abilities and Skills: Considerable knowledge of the methods, practices and techniques used in the administration of comprehensive retirement programs; considerable knowledge of accounting procedures and practices; considerable knowledge of computer software and database systems; general knowledge of investment techniques required to manage investment accounts; general knowledge of actuarial best practices. Ability to communicate effectively verbally and in writing; ability to work independently and multi-task; ability to supervise and train others; ability to make complex mathematical calculations; ability to develop benefit processing systems using acceptable accounting procedures; ability to plan, implement and coordinate benefit programs, including wellness and retirement plans; and the ability to understand and influence the behavior of others within the organization, customers or the public in order to achieve job objectives and cause action or understanding.

Physical Requirements: Physical requirements include arm and hand dexterity enough to use a keyboard and telephone; occasional lifting up to 20 pounds; frequent carrying up to 20 pounds with occasional carrying up to 50 pounds; may be subject to walking, standing, sitting, reaching, balancing, bending, kneeling, crawling, handling, feeling, climbing, smelling and twisting; and vision, speech and hearing sufficient to perform the essential tasks.

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Licenses and Certificates: Possession of a valid Oklahoma Class "D" Operator's License.

WORKING ENVIRONMENT: Working environment is primarily indoors in an office setting. In some positions may require attendance at meetings and other events at field offices throughout the City

Class Code: 1121

EEO Code: N-02

Pay Code: EX-40

Group: Clerical and Administrative

Series: Personnel Management

Effective Date: January 25, 2016