AGENDA

Gainesville Retirement Plan A Called Meeting
Wednesday, December 6, 2017, 2:00 PM
Administration Building, Board Room
300 Henry Ward Way, Third Floor
Chairman or Vice Chairman Presides

PRESENTATION(S):

- Retirement Manager Position — Janeann Allison

EXECUTIVE SESSION:

ADJOURNMENT:

- Final: Wednesday, December 6, 2017, 8:21 AM

CITY OF GAINESVILLE

AGENDAREQUEST

Date Submitted: 12/4/2017

Presenter: Janeann Allison

Item of Business: Retirement Manager Position

Meeting Date: 12/6/2017

Purpose of Request:
The purpose of this request is for the Board to review the job description and consider sharing the cost for this employee.

History/Background:
The Benefit Specialist position is currently vacant. The Administrative Services Director desires to create a new position to specifically address retirement related matters.

Facts & Issues for Consideration:
The Retirement Board has been asked to determine if the Plan should participate in funding the positions and if so at what level.

Department Recommendation:

Department Director:
David Frazier

If funding is involved, are funds approved within the current budget?

Amount Requested:

Source of Funds:
Retirement Plan A and General Fund

Finance Comments:

Administrative Comments:

ATTACHMENTS:

Description	Type
Class Spec - Retirement Manager	Backup Material

CLASS SPECIFICATION

RETIREMENT MANAGER
HUMAN RESOURCES DEPARTMENT

Date Created:	November 2002	**Job Code:**	172
Last Revision:	September 2016	**Grade:**	25 – Exempt
Reports To:	Administrative Services Director	**Retirement Plan:**	A

JOB SUMMARY

Assists the Administrative Services Director in planning, organizing, directing and coordinating the retirement programs for the City of Gainesville. Performs various clerical support tasks related to benefits administration for all retirees, including the timely and accurate payment of invoices, maintaining accurate database with benefit designations of retirees, compiling City retiree census data, etc. Must be able to use considerable judgment and take initiative as required to perform and resolve human resources and/or benefits related tasks while working independently with limited supervision.

MAJOR JOB RESPONSIBILITIES

Prepares retirement estimates and annual actuarial census for the City Plan A retirement program. Calculates final retirement benefits. Prepares and processes employees to retirement status.

Provides assistance to City staff and employees for interpretation of retirement plan documents.

Serves as a non-voting member and secretary to the City's Plan A retirement board.

Serves as liaison for retiree issues regarding benefit questions or problems with monthly benefit payments.

Serves as liaison with all Plan A vendors and providers.

Calculates, prepares and files the retirees ACA and OPEB reporting annually.

Establishes policy/practice and sets the calendar for the Retirement Board.

Prepares public notices, agendas and records official minutes for the Retirement Board as well as all post-meeting action items in accordance with the Open Meetings Act.

Responsible for preparation of the meeting space and materials for each Plan A Board meeting.

Maintains the official plan document.

Maintains a database of retirees and beneficiaries.

Handles all requests for disability retirement.

Oversees the entire Plan A Board Member election process in accordance with the Plan document.

Coordination with Finance Department and Actuary for preparation of actuarial valuation data for retirees, beneficiaries and vested terminations.

Orientation for new board members.

Registration and travel arrangements for Board Member training .

Update/maintain retirement documents on the city's V: drive.

Administers Plan B pension benefit program. Processes applications, obtains certification, coordinates benefit options for retirees with finance/payroll; reviews and processes death and disability benefits requests. Prepares annual census data for Retirement Plan B participants. Coordinates with Georgia Municipal Association (GMA) to obtain retirement estimates.

Serves as Program Manager for all retiree insurance programs and plans. Oversees annual benefits open enrollment for retirees.

Assists in the preparation and distribution of informational literature and presentations to notify and advise employees of benefit plan details and eligibility requirements.

Assists employees transitioning to retirement in completing all necessary forms.

Maintains all beneficiary and other forms for retirees.

Maintains retirement summaries for Plan A and Plan B.

Updates the city retiree website as needed.

Prepares quarterly Plan A newsletter.

Maintains and upgrades professional knowledge, skills, and development by attending seminars and training programs and reading trade and professional journals and publications.

Utilizes Excel and Access software to create custom reports in reference to retirement from the City's back-office payroll software as required.

May be responsible for the work performance of a group of subordinates whose work is complex and requires coordination and integration of work efforts to accomplish established departmental goals.

Performs other related duties as required.

MINIMUM QUALIFICATIONS REQUIRED

Education and Experience:

High School Diploma or G.E.D.

Associate's Degree in Business Management, Finance, Public Administration, Human Resources or related field.

Two (2) to five (5) years of progressively responsible experience in benefits administration; local government experience preferred.

Any equivalent combination of education and experience which provides the minimum level of qualifications stated above.

Licenses and Certifications:

Valid Class C Driver's License and a satisfactory Motor Vehicle Record (MVR).

Must be willing to obtain Certified Public Pension Trustee Designation within 24 months and continue attending programs/classes offered by GAPPT.

Professional in Human Resources (PHR) certification desirable.

Certified Employee Benefit Specialist (CEBS) desirable.

Knowledge, Skills, and Abilities:

Knowledge of State and Federal Employment laws applying to the field of Human Resources, such as FLSA, ADA, FMLA, USERRA, HIPAA, COBRA, Worker's Compensation, etc. and ability to interpret such laws.

Knowledge of Federal and State guidelines for employee benefits.

Knowledge of City's Policies and Procedures and ability to interpret such policies and procedures and provide clarification of policies to employees.

Knowledge of standard practices in Human Resources.

Knowledge of Open Meetings requirements.

Demonstrated proficiency in MS Office applications including Word, Excel, Access, PowerPoint, and Publisher. Ability to create ad hoc reports from multiple software sources.

Skill in use of complex spreadsheets and database creation and management. Ability to learn the City's agenda management software.

Skill in preparing, organizing and maintaining files, reports and records of a confidential nature.

High degree of proficiency and accuracy in all aspects of work product.

Ability to analyze and evaluate both qualitative and quantitative data and provide reports as needed.

Ability to perform complex mathematical calculations.

Ability to manage several projects and priorities simultaneously with high degree of accuracy, diplomacy, and proficiency.

Ability to analyze complex problems and situations quickly, effectively, and objectively to determine the appropriate course of action in each situation.

Ability to comprehend complex technical topics and specialized information.

Ability to use thinking and reasoning to solve problems.

Ability to demonstrate conduct conforming to a set of values and accepted standards.

Ability to work with very limited supervision.

Ability to interpret information and formulate action steps.

Ability to exercise independent judgment and provide recommendations/solutions to problems.

Ability to communicate ideas clearly and effectively both verbally and in writing.

Ability to establish and maintain effective work relationships with other employees within and outside the department, and the general public.

Ability to deal courteously and diplomatically with employees and the public.

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to talk or hear. This is largely a sedentary role; however, some filing is required; it would require the ability to lift files, open filing cabinets and bend or stand on a stool as necessary. Specific vision abilities required by this job include close vision, distance vision, color vision, and ability to adjust focus.

This class specification should not be interpreted as all inclusive. It is intended to identify the major responsibilities and requirements of this job. The incumbents may be required to perform job-related responsibilities and tasks other than those stated in this specification.