



CLASS TITLE | RETIREMENT SPECIALIST

PAY GRADE: AT-36 | www.cityoftulsa.org/pay

Effective Date: 09/21/2022

CLASS CODE: 2546

PURPOSE OF THE CLASSIFICATION: Under direction is responsible for analytical and administrative work involving comprehensive City retirement programs/systems, including coordination with City insurance and health and wellness development programs and performs other related assigned duties.

ESSENTIAL TASKS:

- Prepares and verifies retirement benefit calculations, with proper explanation and documentation for separating employees
- Assists with cost/benefit research and analysis of proposed and current benefit options
- Assists with analyzing, monitoring, reconciling, and submitting data for various benefit programs utilizing actuarial data and/or other financial information and enrollment reports
- Assists with directing fund activities, including those for contribution wires, trades, payment of invoices and others as specified by the MERP board
- Works with the Information Technology Department, other Human Resources Department staff, Finance Department, and/or vendors to develop system procedures to enhance the effectiveness of programs and processes
- Provides administrative support staff services to the Municipal Employees' Retirement Plan (MERP) and the City of Tulsa Deferred Compensation Plan boards and committees
- Prepares and participates in employee seminars and orientations related to retirement plans and benefits and attends training as required regarding retirement plans fiduciary standards
- Counsels participants regarding various benefits and retirement programs
- Resolves, coordinates, and reconciles transactions between the employee, City, agencies and vendors
- Leads and trains support staff on various benefits systems, digital imaging systems and various processes/programs
- Acts as a designee for benefit issues in the absence of the Retirement System Manager
- Reports 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: Must meet the following criteria or an equivalent combination of training and experience per Personnel Policies and Procedures, Section 100:

1. (a) Completion of one hundred twenty (120) hours from an accredited college or university in the field of business or public administration, human resources, management, or other related fields; **and,**
(b) Three (3) years of experience relevant to the essential tasks listed in this job description



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2.
 - (a) Completion of sixty (60) hours from an accredited college or university in the field of business or public administration, human resources, management, or other related fields; **and,**
 - (b) Five (5) years of experience relevant to the essential tasks listed in this job description

Knowledge, Abilities and Skills:

Knowledge of:

- Considerable knowledge of the methods, practices, techniques, and fiduciary standards used in the administration of comprehensive benefits, wellness, and retirement programs
- Considerable knowledge of accounting procedures and practices
- Considerable knowledge of computer software and database systems

Ability to:

- Communicate effectively verbally and in writing
- Work independently and multi-task
- Make complex mathematical calculations
- Develop benefit processing systems using acceptable accounting procedures
- Plan, implement and coordinate benefit programs, including wellness and retirement plans
- Understand and influence the behavior of internal and external customers 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.

Licenses and Certificates: Possession of a valid Oklahoma Class "D" Driver 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.

EEO Code: N-02

Group: Clerical and Administrative

Series: Human Resources Management