

RETIREMENT SERVICES PROGRAM COORDINATOR

KIND OF WORK

Advanced professional auditing, computational, analytical, and counseling work in the determination of retirement benefits.

NATURE AND PURPOSE

An employee in this class, under limited supervision by a Retirement Services Supervisor or Retirement Services Director, coordinates activities related to a significant program within one of the three retirement organizations, and is regarded as a “one of a kind” expert or resource for other retirement system staff, members, annuitants, and others (such as attorneys and judges in marriage dissolution cases). Determinations in area of expertise frequently deal with situations where there is no clear policy or precedent, and decisions are made with a high level of discretion and very little, if any, review; performs related work as required

EXAMPLES OF WORK (A position may not include all the work examples given, nor does the list include all that may be assigned.)

Directs and reviews the final annuity, disability and survivor process or the benefits estimate process for all retirement plans in one of the retirement organizations so that correct benefit payments or estimates are ensured. This is done by training and providing work direction to staff; monitoring work activities; maintaining up-to-date procedures for program, verifying calculations for final claims for benefits.

Coordinates a program of outstate information sessions so that in-person counseling is available to persons employed in greater Minnesota. This is done by scheduling outstate information trips for self and others, delivering presentations, explaining proposed and enacted legislation, describing retirement calculations.

Corresponds with and gives oral presentations to members, former members and retirees, and external contacts on highly technical aspects of the retirement fund law.

Prepares and signs correspondence regarding complex retirement benefit and legal issues without precedent.

Edits organizational publications such as employer manuals, policy manuals, benefit information booklets and brochures, and proposed legislation.

Designs special legislative projects, computational studies and develops future benefits and administrative concepts to enhance the administrative efficiency of the system.

Guides staff in “old law” issues so that there is an understanding of how the law has changed historically and the effect of those changes on members and beneficiaries.

Guides staff, members, former spouses, attorneys, outside agencies, and the courts in the law concerning division of pension in marriage dissolutions so that proper decisions are made. This is done by determining necessary calculations, corresponding with members and attorneys regarding how decrees will be administered; reviewing final judgements and decrees, advising staff on how to calculate marital portions; giving depositions or appearing in court when necessary in divorce cases; reviewing court orders.

Develops, redesigns and maintains officewide data processing programs to support the business functions of the organization. This is done by reviewing legislation to determine necessary changes, designing screens, layout, output, testing, maintenance, procedure writing, management reports, and communicating with information systems personnel.

Develop and draft legislation so that future benefits and administrative concepts are enabled. This is done by surveying staff and other pension funds; selecting and organizing a team to work on changes; drafting administrative bill provisions; meeting with legislative staff to explain and discuss proposed changes; briefing staff after enactment; working with proper staff to implement administrative provisions.

KNOWLEDGE, SKILLS AND ABILITIES REQUIRED

Knowledge of:

Both current and historical complex and highly technical areas of laws, rules, precedents, and legal opinions relating to computation and availability of retirement benefits and rights.

Social security benefits, group insurance coverage, disability benefits, survivor benefits, tax sheltered savings plans, and income tax laws as they relate to retirement.

The principles, methods, and techniques of individual counseling and group meetings as they relate to retirement.

The principles, methods, and techniques of designing research reports and special studies.

Changes in employee status as they affect membership and service credit.

New or emerging developments in the retirement field.

The legislative process sufficient to recommend and lobby for legislative changes to the retirement statutes.

Skill in:

Human relations sufficient to provide lead work direction to other employees, and counseling to members.

Ability to:

Perform analysis sufficient to extract facts related to complex and highly technical areas and/or sensitive matters related to retirement benefits and rights and be able to interpret/apply legal and regulatory requirements.

Communicate effectively, both orally and in writing, sufficient to deal with the organization's management, the entire staff, general membership, attorneys, governmental reporting units, other state agencies, external contacts.

Edit publications and other informational materials.

Develop and modify complex officewide data processing systems used in annuity processing and in the determination of retirement rights.

Understand complex and highly technical areas of the law related to computations of benefits and determinations of retirement rights and make applications of these provisions to specific individual situations.

Design surveys or special studies and reports.

Develop and maintain effective working relationships with representatives of governmental units and retirement fund members.

Est.: 8/8/94

Rev.: 4/00

T.C.:

Former Title(s):