CLASS TITLE: RETIREMENT SPECIALIST

BASIC FUNCTION:
Under direction, interpret and explain laws, regulations, policies, and procedures relating to the California State Teachers Retirement System (CalSTRS) and the California Public Employees Retirement System (CalPERS) as they apply to Ventura County local educational agencies and the processing of payroll and reporting of retirement transactions; process, coordinate, administer, control, and participate in the processing and auditing of payroll information related to retirement issues for both CalSTRS and CalPERS; work with local educational agencies to verify that retirement data is reported timely to the various retirement agencies; advise local educational agencies on the effect of various payroll issues and resulting impact on retirement reporting.

REPRESENTATIVE DUTIES:
Provide support and direction to local educational agencies related to complex CalSTRS and CalPERS issues; interpret and explain laws, regulations, policies, and procedures applying to the retirement systems; assist in providing information to local educational agency staff; answer retirement process and reporting questions and research and resolve concerns, errors, and other retirement-related issues; E

Assist local school districts regarding payroll difficulties, errors, and discrepancies in complying with complex CalSTRS and CalPERS requirements; E

Coordinate, administer, control, and participate in the processing and auditing of payroll information related to retirement issues; verify the appropriateness of codes, amounts, and coverage periods; inform local educational agencies of required corrective changes; assure the appropriateness and timeliness of data reported to CalSTRS and CalPERS in the form of reports and remittances; E

Prepare remittance reports with employee and employer contribution data and amounts, and submit report data and amounts in accordance to retirement regulations and timelines; E

Compile and submit retirement reports within CalSTRS and CalPERS prescribed deadlines; E

Assure compliance with complex CalSTRS and CalPERS regulations, policies, and procedures; serve as a liaison between the local educational agencies and the retirement systems; maintain current knowledge of complex retirement and Social Security laws and regulations; provide advice and direction to school districts regarding various new or continuing CalSTRS and CalPERS regulations and program issues; E

Provide information to local educational agency staff on retirement issues relating to negotiated settlements with bargaining units; advise various levels of staff on the payroll and retirement reporting effect of the negotiated settlements; advise payroll staff on how to process payroll as a
result of negotiated settlements; 

Conduct workshops to educate and explain CalSTRS and CalPERS rules, regulations and policies, and how to apply that knowledge in the appropriate reporting of payroll and retirement data; 

Participate in the development and improvement of the various financial and payroll systems used by VCOE; provide information and feedback to system vendor related to retirement processes and reports; provide implementation training to local educational agency staff for new payroll system improvements related to retirement issues; test new system features related to retirement processing and reporting; 

Train and provide work direction of assigned personnel; coordinate work flow and assign and review the work of retirement support personnel to assure appropriateness and completeness of work; assist assigned personnel with the resolution and completion of more difficult or complex issues; 

Attend local, regional and state training and informational meetings conducted by CalSTRS and CalPERS personnel; 

Operate a variety of office equipment, including a computer, audio/visual equipment needed for presentations, microfiche and imaging readers/printers, telephone, fax machine and copier; and 

Perform related duties as assigned. 

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:**
Advanced and complex CalSTRS and CalPERS laws, policies, and procedures;
Applicable sections of the State Government and Education Codes and other laws, rules and regulations related to CalSTRS Defined Benefit, Defined Benefit Supplemental and Cash Balance Plans, CalPERS, Social Security, and other assigned retirement system activities;
Policies and objectives of retirement programs and activities;
Complex payroll and reporting requirements of CalSTRS, CalPERS and Social Security;
Policies and objectives of retirement programs and activities;
Concepts, applications and operations of integrated computerized business systems, related business software and office software systems and equipment used by VCOE;
CalSTRS and CalPERS retirement data submittal and reporting systems;
Complex accounting and payroll procedures related to retirement activities;
Principles of training and providing work direction;
Complex payroll concepts;
Correct English usage, grammar, spelling, punctuations and vocabulary;
Effective oral and written communication skills; and 
Interpersonal skills using tact, patience and courtesy.

**ABILITY TO:**
Read, learn, interpret, apply and effectively explain complex CalSTRS and CalPERS laws, rules,
regulations, and procedures;
Coordinate, administer, control, and participate in the processing and auditing of payroll
information related to complex retirement issues;
Understand how computerized financial and payroll systems process retirement information;
Provide payroll system vendors with detailed information for the improvement of the systems
related to payroll and retirement processing and reporting;
Train and provide work direction of assigned personnel;
Hearing and speaking to effectively communicate and exchange information;
Communicate effectively both orally and in writing;
Prepare and deliver oral presentations;
Establish and maintain cooperative and effective working relationships with others;
Maintain records and prepare reports;
Work independently with little direction;
Plan and organize work to meet schedules and timelines; and
Operate a computer to enter and analyze data, maintain records and generate reports.

**EDUCATION AND EXPERIENCE:**
Graduation from high school supplemented by college-level course work in accounting and four
years increasingly responsible financial and/or payroll experience with two additional years
processing technical issues related to public retirement systems, including experience working
with integrated financial systems.

-OR-
An associate’s degree in business, accounting, public administration, finance or closely related
field and two years of increasingly responsible financial and/or payroll experience with
processing technical issues related to public retirement systems, including experience working
with integrated financial systems.

**LICENSES AND OTHER REQUIREMENTS:**
A valid California driver's license.

**WORKING CONDITIONS:**
**ENVIRONMENT:**
Office environment, and
Subject to driving to various sites to conduct work.

**PHYSICAL ABILITIES:**
Vision to drive and to observe, review and analyze financial and payroll documents and reports;
Hearing and speaking to effectively communicate and exchange information;
Sitting for extended periods of time;
Some climbing of small ladders;
Bending, kneeling and reaching to retrieve and file records;
Lifting boxes weighing up to 30 pounds; and
Dexterity of hands and fingers to file and operate office technology and equipment.

Should an applicant require reasonable accommodation, the Ventura County Office of Education
will consider that upon request.

*February 2016*
*REVISED June 2016*