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

ESSENTIAL TASKS:
- Coordinates City retirement and related benefit programs ensuring compliance as acceptable under fiduciary care standards, including research, policy and procedure development and funding maintenance and improvements
- Analyzes, monitors, reconciles and submits data for various benefit programs utilizing actuarial data and/or other financial information and enrollment reports
- Directs fund activities, including those for contribution wires, trades, payment of invoices and others as specified by the MERP board
- 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, goal setting; 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 in preparation of training employees on retirement plans and options including education outreach through employee orientation and pre-retirement seminars
- Manages the development of MERP Board and Deferred Compensation Committee Meeting agendas, providing effective communications with Board members and vendors related to board business matters
- Coordinates with the Information Technology Department to develop system procedures to enhance the effectiveness of programs and processes
- Manages the data and information required for the Annual Actuarial Report
- Evaluates program effectiveness, establishes improvement goals and provides progress reports and recommendation to management, the MERP Board of Trustees and Deferred Compensation Committee
- Manages the retiree payroll process monthly
- Manages the research and resolution of retiree issues, including but not limited to Qualified Domestic Relation Orders (QDRO) and other legal and actuarial issues
- Ensures compliance with contracts, agreements, and federal regulations
- Reviews policies and procedures related to retirement issues and provides updates as needed to ensure compliance with current HR programs
- Oversees the resolution and coordination of transactions between the employee, City, and vendors
- Develops and implements employee communication programs related to retirement benefits
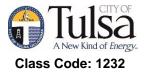- Must report to work on a regular and timely basis

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

QUALIFICATIONS:

Training and Experience: Must meet one of the following options or an equivalent combination of training and experience per Personnel Policies and Procedures, Section 100:

> (a) Completion of one hundred and twenty (120) hours from an accredited college or university in the field of business/finance 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 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:
- Ability to communicate effectively both 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
- Ability to 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: E-02
Group: Clerical and Administrative
Series: Personnel Management