



**SACRAMENTO REGIONAL TRANSIT DISTRICT
invites applications for the position of:**

Retirement Services Analyst II

SALARY: \$71,988.00 - \$100,776.00 Annually

DEPARTMENT: Pension & Retiree Services

OPENING DATE: 08/31/20

CLOSING DATE: 09/20/20 11:59 PM

**RECRUITMENT
TYPE:** Internal/External

DESCRIPTION:

The purpose of this position is to provide analytical and technical support for retirement program coordination including defined benefit pension plans, defined contribution plans and associated program activities. This is accomplished by reviewing and analyzing plan documents, laws, policies, procedures, Collective Bargaining Agreements (CBA's) and Memorandums of Understanding (MOU's) and applying these provisions in the education of employees and retirees, the development of documents and correspondence, the calculation of retirement benefits and the support of the Retirement Boards and the Defined Contribution Fiduciary Committee. Update and maintain various department databases, Retiree Records Management, tracking and reporting information, work with consultants, and participate in special projects.

DISTINGUISHING CHARACTERISTICS:

Incumbents perform the full range of standard work procedures, operations, tasks, duties, and responsibilities with little or no immediate supervision. This classification is distinguished from the lower classification of Retirement Services Analyst I in that the former performs the more routine entry-level analytical duties. The Retirement Services Analyst II is distinguished from the higher level classification of the Senior Retirement Analyst in that the latter performs the most complex work.

EXAMPLES OF DUTIES:

1. Performs day-to-day defined benefit program administration by preparing benefit estimates and calculations conducting retirement appointments and processes associated retirement paperwork in accordance with the respective Plan documents, CBA's and MOU's. Responds to participant/member calls and facilitates requests.
2. Consults with participants/members on pension plan provisions.
3. Supports and liaisons with the Retirement Boards, prepares reports and analyses for Retirement Board presentations and makes occasional presentations to the Retirement Board.
4. Provides support and data in the preparation of the annual financial statements, Plan participant transfers, public information requests, labor negotiations, benchmarking studies and other special projects.
5. Compiles, reviews, audits, and verifies demographic data on employees and retirees supporting the annual actuarial valuations.
6. Assists with the administration of the term not vested, deceased retiree, the lost participant processes, employee contribution refund and corrective payment processes.
7. Works independently on special department projects. Work may include collaboration with external consultants and vendors.
8. Develops and/or updates policies and procedures, supports compliance and analysis activities.
9. Inputs and tracks employee and retiree information into various department databases.
10. Coordinates with IT and Payroll in the testing, research, and troubleshooting HRIS system updates or benefit payment errors.
11. Coordinates Retirement Board agenda/packets and facilitates Retirement Board meetings.

12. Coordinates Defined Contribution Fiduciary Committee meetings and provides support to the committee.
13. Performs day-to-day defined contribution plan administration and participates in special projects.
14. Provides professional support in the development and application of policies and procedures for the Defined Benefit Plan and the 457b and 401a Defined Contribution Plans.
15. Performs other duties as assigned.

MINIMUM QUALIFICATIONS:

A combination of education and/or experience that provides the required knowledge, skills and abilities to perform the essential functions of the position. SacRT reserves the right to determine the equivalences of education and experience.

Education: Bachelor's degree

Experience: A minimum of three (3) years of professional experience with pension plan administration and/or defined contribution administration. Public sector experience is preferred.

License/Certification: None

Proof of required education beyond high school, such as college transcripts, diplomas, and/or certificates must be submitted at the time of application, if not substituting experience for the education requirement.

FILING INSTRUCTIONS/SUPPLEMENTAL INFORMATION:

The minimum qualifications as stated on this job announcement represent only the basic requirements of the position. Meeting the minimum qualifications does not guarantee that a candidate will be invited to participate in other examination segments of the selection process. An employment application and proof of education, as outlined above, are required for this position. Applications and job announcements are available through our website at www.sacrt.com.

Completed employment application and proof of education, as outlined above, must be submitted online no later than Sunday, September 20, 2020 at 11:59 p.m. RT will not process incomplete applications. **Resumes are not accepted in lieu of an application, but may be included with the application.** For more information on benefits, a summary sheet is available from the Human Resources Department. The Human Resources Department will make reasonable efforts in the recruitment process to accommodate candidates with disabilities. For more information, contact the Human Resources Department at (916) 556-0298.

SacRT has a stand alone pension plan which is not part of, nor does it have reciprocity with CalPERS.

RT is an Equal Opportunity Employer. EOE – Minorities/Women/Disabled/Veterans

This position falls under Management and Confidential Employee Group (MCEG).

APPLICATIONS MAY BE FILED ONLINE AT:
<http://www.sacrt.com/Career/>

Position #2020-00284
RETIREMENT SERVICES ANALYST II
LC

2810 O Street
Sacramento, CA 95816
(916) 556-0298

Retirement Services Analyst II Supplemental Questionnaire

- * 1. Please describe your experience administering pension plans, defined contribution plans, and/or employee benefits plans. In your description, include your position title and the length of time you were in the position.

- * 2. Please detail your experience querying, manipulating and analyzing large data sets. In your response, include the employer, your position title, the length of time you were in the position, the details of the data involved, and your responsibilities related to the data.

 - * 3. Please describe your experience reviewing, analyzing and applying provisions of benefit plan documents, collective bargaining agreements, administrative policies and/or procedures and applicable laws. In your description, include your position title and the length of time you were in the position.
- * Required Question