



New Mexico State Personnel Office

2600 Cerrillos Road
Santa Fe, New Mexico 87505-0127

Classification Description

RETIREMENT SPECIALIST SUPERVISOR

<u>Class Title</u>	<u>Class Code</u>	<u>Pay Band</u>	<u>Alt Pay Band*</u>
Retirement Specialist Supervisor	C2050S	60	65

**In accordance with SPB Rule 1.7.4.10 NMAC, the assignment to alternative pay bands shall be reviewed annually to determine their appropriateness.*

Purpose

Devotes a substantial portion of time assigning and directly supervising work of at least two (2) full time equivalent employees, acting upon leave requests, conducting annual performance evaluations and recommending disciplinary actions. Interviewing and recommending selection of applicants and conducting training of personnel. Plans, directs, or coordinates activities in the Retirements/Payroll or Requests Units. Position is responsible for reviewing and verifying the staff member's processing of member audits, and reconciliations of credited and withdrawn service.

Nature of Work

The Retirement Specialist Supervisor devotes a substantial portion of time assigning and directly supervising work of at least two (2) full time equivalent employees. This position is responsible for reviewing and verifying the staff member's processing of member audits and reconciliations of credited and withdrawn service. Additional duties include direct oversight of Purchase Agreements on military service credit, air time, out-of-state service credit, non-reported service credit, and withdrawn service. This position supervises the payroll process to include deductions for taxes, retiree health care and court-ordered pension benefit divisions. When multiple plans are involved, this position must calculate the pension amounts due under each plan and combine the calculations for the total pension benefit.

Distinguishing Characteristics

The omission of specific statements does not preclude management from assigning other duties which are reasonably within the scope of the duties.

Supervisor

This position is required to supervise at least two (2) permanent, full-time employees for which job duties are defined, work is assigned, and the work product is evaluated to the degree that it meets expectations. Accountability is required for the accuracy of customer requests for total service credit, benefit estimates, purchases of service credit for air time/withdrawn service/military service/out-of-state service/non-reported service, granting free military service credit, beneficiary deselections, and the Exceptions Report. This position is responsible for ensuring the accuracy of retiree payroll to include direct deposit changes, tax deduction changes, 1099R form accuracy, Cost-of-Living Adjustment (COLA) increases, and all benefit

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divisions. Problem solving is required by having a thorough knowledge and understanding of retirement eligibility, guiding regulations, state statutes, plan applicability, employer responsibilities, and legal requirements. Specialized knowledge is required for PERA-specific retirement plans for state legislators, judges, magistrates, and volunteer firefighters that are funded by sources other than employer/employee contributions. This position is responsible and accountable for the complete integrity of the retirement process to include accuracy of the application package, verifying of retirement qualifications and contributions, verifying employer certifications, placing retirees on payroll, processing any pension benefit changes, terminating benefits upon death, and implementing survivor benefits. It is crucial for this position to display fiduciary responsibility to protect the PERA/ERB Trust Funds through reconciliation of manual retirement calculations and the retirement data system calculations. This position must make well-informed, effective, timely decisions, and revise decisions as required to accomplish the task at hand, and it must communicate clearly and present points-of-view in a clear, convincing manner. This position must build and manage the workforce based upon organizational needs, budget considerations, and unit needs.

Recommended Education and Experience for Full Performance

Bachelor's degree in Business Administration, Public Administration, or Accounting and two (2) years of direct experience in retirement processing, benefits administration, and/or auditing, one of which must be supervisory.

Minimum Qualifications

Associate's degree in Business Administration, Public Administration, or Accounting and two (2) years of direct job experience in retirement processing, benefits administration, and/or auditing. Any combination of education from an accredited college or university in a related field and/or direct experience in this occupation totaling four (4) years may substitute for the required education and experience.

Knowledge and Skills

*Note: This information has been produced by compiling information and documentation provided by O*NET. O*NETTM is a trademark of the U.S. Department of Labor, Employment and Training Administration.*

Knowledge

Leadership - Knowledge of leading through influence and persuasion by establishing mutual trust, respect, and loyalty, through shared beliefs, values, and goals; Being cognizant of subordinates' needs, goals, and aspirations, and to carefully consider these personal variables when making decisions.

Economics and Accounting — Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.

Mathematics — Knowledge of arithmetic, algebra, geometry, calculus, statistics, and their applications.

English Language — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.

Clerical — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology.

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Computers and Electronics — Knowledge of circuit boards, processors, chips, electronic equipment, and computer hardware and software, including applications and programming.

Administration and Management — Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.

Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.

Law and Government — Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.

Skills

Leadership - Displaying attributes that makes employees willing to follow; applying effort to increase productiveness in areas needing the most improvement; establishing a spirit of cooperation and cohesion for achieving goals; making the right things happen on time; providing performance feedback, coaching, and career development to individuals to maximize their probability of success; giving subordinates the authority to get things accomplished in the most efficient and timely manner.

Active Listening — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.

Mathematics — Using mathematics to solve problems.

Reading Comprehension — Understanding written sentences and paragraphs in work related documents.

Writing — Communicating effectively in writing as appropriate for the needs of the audience.

Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

Speaking — Talking to others to convey information effectively.

Judgment and Decision Making — Considering the relative costs and benefits of potential actions to choose the most appropriate one.

Complex Problem Solving — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

Time Management — Managing one's own time and the time of others.

Active Learning — Understanding the implications of new information for both current and future problem-solving and decision-making.

Statutory Requirements: N/A

Conditions of Employment: Working Conditions for individual positions in this classification will vary based on each *agency's utilization, essential functions, and the recruitment needs* at the time a vacancy is posted. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.

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Default FLSA Status: Exempt.

Bargaining Unit: Not Covered

Established: 10/28/2013 **Revised:**

***Means two (2) or any combination of full-time equivalent (FTE) status that equals at least two (2) regular or term status employees in non-temporary positions.*

****Adapted from the United States Bureau of Labor Statistics and are intended to illustrate the typical education and experience required for this occupation. Not to be construed as minimum qualifications.*

Note: Classification description subject to change. Please refer to the SPO website www.spo.state.nm.us to ensure this represents the most current copy of the description.