

**JOB DESCRIPTION**  
**San Diego County Office of Education**

**Manager, Retirement Systems**

**Purpose Statement**

The job of Manager, Retirement Systems is done for the purpose/s of planning, organizing, coordinating and managing a variety of payroll deductions for the California State Teachers' Retirement System (CalSTRS), California Public Employees' Retirement System (CalPERS), Social Security, Medicare, and other alternative retirement programs for school district employees in the County; ensuring compliance with established laws, codes, regulations, and legal requirements; and supervising and evaluating the performance of assigned personnel.

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**Diversity Statement:**

Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, and being accountable for one's actions and the resulting impact.

**Essential Functions**

- Analyzes and interprets legal codes, ruling, retirement and tax requirements for the purpose of maintaining current knowledge of applicable regulations.
- Attends a variety of staff, management, local and state committee meetings for the purpose of serving on local, state and regional advisory committees to keep abreast of upcoming proposals and changes.
- Collaborates with integrated technology systems personnel for the purpose of determining program and system requirements, identifying system problems and validating test and system outputs.
- Communicates with district human resources and payroll personnel and appropriate agencies for the purpose of resolving retirement and tax related issues and/or technical matters and procedures.
- Conducts workshops and training sessions for staff and member districts personnel for the purpose of providing information on proposed retirement law changes, the input of source data, retirements membership criteria, and the preparation of required records and reports.
- Coordinates, trains and assists the independent districts for the purpose of assisting with preparation for their retirement reports, conferring with their data processing staff to coordinate system modification to interface with the county payroll retirement reporting system.
- Manages retirement program payroll deductions and related tax documents (e.g. CalSTRS, CalPERS, Social Security, Medicare, etc.) for the purpose of ensuring timely and accurate input, correction and auditing of retirement data.
- Monitors the preparation and maintenance of a variety of complex financial and statistical records and reports (e.g. payroll, retirement, , cash transfers, employee service credit, contributions, expenditures, etc.) for the purpose of documenting activities, meeting compliance requirements and /or providing supporting materials for requested actions.
- Organizes work assignments and schedules of department staff for the purpose of determining priorities and assuring services are provided in a timely and efficient manner.

- Oversees the calculation of employer costs and deposits of employee and employer contributions for the purpose of ensuring compliance with legal, financial and county/state/federal requirements in accordance with established schedules.
- Performs personnel administrative functions (e.g. interviewing, evaluating, supervising, scheduling, etc.) for the purpose of maintaining adequate staffing, enhancing productivity of personnel and achieving objectives within budget.
- Provides technical expertise to County Office and school district personnel and administrators for the purpose of providing information and/or assisting in identifying and resolving issues/problems.
- Reviews pending legislation for the purpose of maintaining current knowledge of legal requirements and preparing summaries and recommendations for maintaining compliance with current or new legislation.

### **Other Functions**

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

### **Job Requirements: Minimum Qualifications**

#### **Skills, Knowledge and Abilities**

SKILLS are required to perform multiple, technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: applying district, state and federal policies and regulations; operating standard office equipment; preparing and maintaining accurate records; planning and managing projects; analyzing data; and utilizing pertinent software applications.

KNOWLEDGE is required to perform algebra and/or geometry; read technical information, compose a variety of documents, and/or facilitate group discussions; and solve practical problems. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: codes, regulations & laws related to the job functions; concepts of grammar and punctuation; office application software; practices of personnel administration; recordkeeping and record retention practices.

ABILITY is required to schedule activities, meetings, and/or events; often gather, collate, and/or classify data; and use basic, job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using defined methods. Ability is also required to work with a diversity of individuals and/or groups; work with a variety of data; and utilize specific, job-related equipment. Problem solving is required to analyze issues and create action plans. Problem solving with data requires analysis based on organizational objectives; and problem solving with equipment is moderate. Specific ability based competencies required to satisfactorily perform the functions of the job include: communicating with diverse groups; meeting deadlines and schedules; maintaining confidentiality; working with constant interruptions; and working with detailed information/data; accuracy and attention to detail; setting priorities; working as part of a team.

### **Responsibility**

Responsibilities include: working under limited supervision using standardized practices and/or methods; directing other persons within a department, large work unit, and/or across several small work units; monitoring budget expenditures. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the organization's services.

## **Working Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, and significant fine finger dexterity. Generally the job requires 80% sitting, 10% walking, and 10% standing. This job is performed in a generally clean and healthy environment.

- Experience** Four (4) years of professional-level payroll/retirement system experience with the California State Teachers' Retirement System (CalSTRS), California Public Employees Retirement System (CalPERS), Social Security, and Medicare payroll deductions, including experience in a supervisory capacity.
- Education** Bachelor's degree in business administration, accounting or related field.
- Equivalency** A combination of education and experience equivalent to a bachelor's degree in business administration, accounting or related field, and four years of professional-level payroll/retirement system experience with the California State Teachers' Retirement System (CalSTRS), California Public Employee's Retirement System (CalPERS), Social Security, and Medicare payroll deductions, including experience in a supervisory capacity.

### **Required Testing**

N/A

### **Certificates**

Valid CA Driver's License

### **Continuing Educ./Training**

Maintains Certificates and/or Licenses

### **Clearances**

Criminal Justice Fingerprint/Background Clearance  
Physical Exam and drug screen  
Tuberculosis Clearance

**FLSA State:** Exempt

**Salary Range:** Classified Management, Grade 44

**Personnel Commission Approved: October 19, 2016**

Revised: 06/2023