

**THE CITY OF HOLLYWOOD
EMPLOYEES' RETIREMENT FUND**

**JOB OPENING FOR EXECUTIVE DIRECTOR
Closing Date: October 10, 2017**

POSITION DESCRIPTION

GENERAL

The Board of Trustees of the City of Hollywood Employees' Retirement Fund (the "Fund") is currently seeking a full-time Executive Director to provide administrative services. The Fund is a public employee defined benefit pension plan with more than 600 active members and 800 retirees as of October 1, 2016. The Executive Director reports directly to and works at the direction of the Board of Trustees.

SPECIFIC DUTIES AND RESPONSIBILITIES

The Executive Director position includes the following duties and responsibilities as well as other related assignments, as may be directed by the Board.

Administering the Retirement Fund:

- Enrolls eligible new members into the Retirement Fund. Includes securing designations of beneficiaries and providing members with information concerning plan provisions.
- Processes terminated employees. Includes verification and computation of refunds of contributions and amounts eligible for direct rollovers.
- Processes early and normal retirements, as well as vested terminations. Includes determining eligibility for benefits, obtaining and verifying earnings certified by the City, obtaining required documentation from the retiree, computation of retirement benefit options and thorough review of plan provisions and benefit options with the retiring employees.
- Processes disability claims by collecting necessary medical and injury documentation, setting appointments with medical board physicians, obtaining medical board physicians' reports, scheduling disability hearings, and providing notifications to disability applicants.
- Processes survivors' claims. Includes verification of benefit eligibility and securing required documentation.
- Maintains accurate and complete employment and retirement contribution records for all members.
- Maintains complete records of retired members.
- Confirms receipt of member contributions following each payroll period, and confirms employer contributions from City no less frequently than quarterly.
- Maintains and verifies member records on pension benefit computer system, including downloading of information from the City on a bi-weekly basis.
- Maintains and verifies bi-weekly payroll and contribution records and manually updates pension benefit computer system for **employees**.

- Reconciles custodial, investment management, bill-paying and bookkeeping statements and reports.
- Coordinates and conducts Board of Trustees elections.
- Verifies annual interest posted to employee contributions and DROP accounts.
- Coordinates annual audit and actuarial valuation processes.
- Keeps updated on new issues and laws affecting public pension plans.
- Administers the “Planned Retirement Benefit” (supplemental benefit available to certain Plan members), including enrollment and termination of Planned Retirement participants. Maintains Planned Retirement deposit and interest records, and processes periodic statements to Planned Retirement members. Provides information to Plan members concerning Planned Retirement procedures and provisions.

Representing the Board of Trustees:

- Implements directives and policies of the Board of Trustees.
- Works with Plan Attorney to ensure compliance with the City of Hollywood Code of Ordinances and applicable federal and state laws. Brings to the attention of the Board of Trustees any and all concerns regarding non-compliance.
- Communicates and interacts with City Officials.
- Develops and maintains high level relationships with City Departments, employees and union representatives.
- Maintains a professional relationship with each retiree.
- Develops and maintains a full working knowledge of all of the Plan’s professional advisors and the services they provide. Advisors include Attorneys, Actuaries, Auditors, Custodians and Investment Managers, specializing in Public Pension Plans.
- Acts as a liaison between the Board and professional advisors and service providers.
- Maintains a list of available physicians in various specialties to perform examinations of disability applicants and retirees.

Providing administrative support to the Board of Trustees:

- Coordinates all Board of Trustees meetings. This includes preparation of meeting agendas in consultation with Board Chair, scheduling, posting of meeting notices and agendas in compliance with the Florida Sunshine Law, distribution of meeting back-up material to the Board of Trustees, and preparation and distribution of meeting minutes.
- Working with legal counsel, researches eligibility for class action suits and files required claims in timely manner.
- Determines policy areas requiring Board consideration and action.
- Verifies unpaid bills and prepares bill lists, warrants and checks for Board approval.
- Coordinates ordinance amendment process.

- Coordinates travel arrangements for Trustees attending pension-related schools and conferences.
- Maintains Trustees' education attendance records.
- Maintains Trustees' meeting attendance records.
- Conducts surveys and performs other duties as assigned by the Board.
- Assists the Board in developing and amending policies and procedures as needed.

Provides information to members:

- Coordinates and conducts periodic educational workshops for members, including pre-retirement education, plan provisions, planned retirement provisions, and other relevant topics.
- Updates and ensures accuracy of Retirement Fund website.
- Prepares and distributes annual benefit statements to all active members.
- Prepares and distributes annual newsletters, financial and actuarial information and notices of plan changes to all members.
- Prepares and distributes bi-annual summary plan descriptions.
- Coordinates collection of annual verification forms from inactive members.
- Coordinates annual review of disabled retirees.
- Verifies annual Forms 1099-R prepared by Custodian.

Provides general office management:

- Hires, trains and supervises Retirement Fund office personnel.
- Prepares and processes semi-monthly payroll for Retirement Fund personnel, including preparation of monthly payroll tax deposits and completion and filing of quarterly Forms 941 "Employer's Quarterly Tax Return" and UCT-6 "Florida Unemployment Tax Wage Summary," and annual Forms 940 "Federal Unemployment Tax Return," and W-2 "Earnings." Includes the competent use of appropriate software programs to perform these duties.
- Prepares annual performance appraisal of personnel who have direct reporting relationship to the Executive Director.
- Maintains proper insurance records.
- Maintains records in compliance with records retention schedule and arranges for proper destruction of records.
- Purchases office supplies and equipment, and coordinates repair and maintenance of office equipment.
- Maintains procedures manual and Trustees' handbooks.
- Maintains back-up of computer records.

- Maintains full working knowledge of relevant computer software, and installs software upgrades as necessary. Maintains control of office computer network and computer records, and installs hardware upgrades as necessary.

The Executive Director shall also have such special powers and duties as may be properly delegated or assigned by the Board from time to time.

KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of the principles and practices of retirement benefit administration. Ability to exercise initiative and independent judgment in matters relating to the management of the Retirement Fund. Ability to effectively communicate both orally and in writing. Ability to establish and maintain effective working relationships with Trustees, members, City officials and consultants. Ability to maintain accurate and complete records. Ability to utilize computer and other office equipment, and to utilize various software programs.

MINIMUM QUALIFICATIONS

Bachelor's degree from an accredited college or university with major coursework in Finance, Accounting, Public Administration or closely-related field. Six years of progressively responsible work experience in benefits administration, retirement plan administration, or experience in administrative work or fiscal management or equivalent in education, training, and experience which would provide the necessary knowledge, skills and abilities. Certified Public Accountant (CPA) licensed/exam eligible preferred or CPPT or CAPP eligible. Previous experience in a municipal government a plus. FPPTA or similar certification required.

PHYSICAL REQUIREMENTS

Must have the use of sensory skills in order to effectively communicate and interact with other employees and the public through the use of the telephone and personal contact as normally defined by the ability to see, read, talk, hear, handle or feel objects and controls. Physical capability to effectively use and operate various items of office related equipment, such as, but not limited to, a personal computer, calculator, copier and fax machine. No significant standing, walking, moving, climbing, crawling, with some carrying, bending, kneeling reaching, and handling pushing and pulling.

COMPENSATION

Compensation consists of a salary and benefit package commensurate with experience and qualifications.

NON-DISCRIMINATION

The Board of Trustees supports the principle of equal opportunity for all individuals, regardless of age, race, color, gender, religion, national origin, sexual orientation, disability, veteran status or any other protected category pursuant to applicable federal, state or local law.

CONTACT INFORMATION

Interested, qualified candidates may contact Phyllis Shaw, Chair, Board of Trustees, City of Hollywood Employees' Retirement Fund, City Hall Annex, Room 20, 2600 Hollywood Blvd, Hollywood, Florida 33020; or by email at pshaw@hollywoodfl.org.