Our County:

Located halfway between Los Angeles and San Francisco, about 260,000 people call San Luis Obispo County home. Over a dozen delightful towns and cities, including San Luis Obispo, Arroyo Grande, Atascadero, Avila Beach, Cambria, Cayucos, Morro Bay, Nipomo, Paso Robles, Pismo Beach, San Miguel, San Simeon, and others create a variety of climate and community choices within a few miles of each other.

San Luis Obispo County is home to California Polytechnic State University, Cuesta Community College, Hearst Castle, two of the 21 historical California missions, and a commercial airport. San Luis Obispo County schools are among the highest ranked in the state.

San Luis Obispo County is one of the largest wine regions in California. Throughout the County there are year-round farmers markets, recreational activities, wine tours, and cultural events to meet all your relaxation needs. Agriculture, government, tourism, recreation, and a growing technology business sector make up the stable economic background of the County.

HOW TO APPLY:

To apply, you are required to submit your **resume**; **letter of interest** including details about your experience and background in benefits administration and benefit or payroll software systems; and **essay responses** to the following supplemental questions:

1. Please elaborate on your experience with supervision, particularly involving professional level staff. Describe your management style when dealing with personnel or organizational issues.

2. Please elaborate on your experience administering pension, or benefit functions and how that experience equips you to effectively manage the benefit administration function for a highly complex defined benefit pension plan.

3. Please elaborate on your experience working with and knowledge of complex benefit recordkeeping/administrative software. How long have you worked with such systems? What was your role in working with such software systems – e.g., high level user, system administrator, manager, Information Technology professional, etc.

4. Describe your experience in making presentations to a Board of Trustees or similar governing body and/or interacting with such Boards.

Please email the required submittals to jazarvand@co.slo.ca.us <u>no later than November 14, 2014</u> to be considered for this position.

Deputy Executive Secretary

San Luis Obispo County Pension Trust

First application review is scheduled for November 14, 2014

The Job:
The San Luis Obispo County Pension Trust is seeking an innovative, responsive and high performing business professional to serve as the key Deputy to the Executive Secretary in managing a highly complex defined benefit retirement system. In particular, this position takes a leadership role in managing the benefit administration and recordkeeping systems side of the Pension Trust's operation. Secondary involvement in the investment management of the Trust's $1 billion of assets will also be a component of the job. The Pension Trust has a total staff of nine.

This position requires a high level of experience, independent judgment, analytical abilities and communication skills. Along with professional staff, this individual will interface significantly with actuaries, legal counsel, upper management, software vendors and staff of the plan sponsor and related contract agencies.

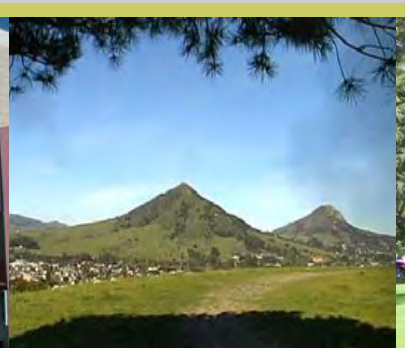
For more information about the San Luis Obispo County Pension Trust, please go to: http://www.slocounty.ca.gov/PensionTrust.htm

Compensation:
Current Salary Range: $99,555—$121,012 DOQ
plus a generous benefits package

The Ideal Candidate will have a minimum of five years of increasingly responsible professional level experience working with retirement systems, benefits administration or similar. At least two years of experience with a defined benefit pension system is required.

A bachelor's degree in Business, Human Resources, Accounting, Finance, Management, Public Administration or a related field is required. An advanced degree and/or professional certification is preferred. Job-related experience may substitute for the required education on a year-for-year basis. We are looking for a candidate who:

- Is an experienced **leader and manager** who has a record of working effectively with a wide variety of stakeholders and fellow professionals in administering a pension or benefit related operation.
- Has a **thorough level of expertise in benefits administration and software systems** to serve the members and participants of the retirement plan and to further the goals of efficient and competent management. A "members come first" attitude is crucial.
- Possesses the highest level of personal and professional **integrity**.
- Has a strong record of developing and maintaining effective **interpersonal relationships** with department staff, governing Boards, other public agencies, other professionals such as actuaries and legal counsel, and the public.
- Demonstrates calm, centered and confident leadership that **inspires** others to commit to providing outstanding customer service.
- Is an excellent **communicator** and listener who can work collaboratively with community groups, elected and appointed officials, public agencies and the public.



DEFINITION:

The Deputy Executive Secretary for the Pension Trust assists the Executive Secretary in his/her responsibilities as set forth in the By-Laws of the Trust and in the San Luis Obispo County Retirement Plan. Under general direction of the Executive Secretary, the Deputy Executive Secretary performs complex management and administrative duties including fiscal and budgetary, personnel, management information systems, and Pension Trust operational activities; assists with investment management and administration; coordinates, organizes and manages office and business activities and flow of communications and information; supervises, trains and evaluates the performance of assigned personnel; and does other related work as required. This position requires a high level of experience, independent judgment, analytical abilities and communication skills to manage a complex retirement benefit operation and the management of a large investment trust.

REPRESENTATIVE DUTIES:
(Not in order of importance)

- Performs a variety of activities involved in the overall administrative, fiscal, budgetary and personnel management of the Pension Trust; assists in establishing and maintaining Pension Trust timelines and priorities; assures related activities comply with established standards, requirements, policies and procedures.
- Manages and administers the Pension Trust retirement plan in consultation with other staff and professional service providers.
- Assists with the investment management and administration of a large trust fund.
- Monitors the operation for compliance with regulations, internal controls and best practices in retirement system administration.
- Monitors and assesses the efficiency of Pension Trust operations.
- Provides consultation to Pension Trust staff, Trustees, Members, labor organizations and employers on complex Retirement Plan administrative matters.
- Communicates with Pension Trust plan sponsors, employers, labor organizations, professional service providers and Members.
- Provides program related consultation and recommendations to Trustees, staff and the public; responds to inquiries, resolves issues and conflicts and provides detailed and technical information concerning related standards, practices, laws, codes, regulations, policies and procedures.
- Prepares and maintains a variety of reports and documentation related to Pension Trust activities, project scheduling, requests for proposal, and related activities. May develop, analyze and monitor program budgets, quarterly and annual summary as required; responds to audit reports and inquiries; maintains research analysis summaries, trend review reports, charts, memorandums and other documentation as needed for effective research collection and policy implementation.
- Attends and conducts a variety of meetings; prepares and delivers oral presentations related to Pension Trust activities.
- Acts as the Executive Secretary in his or her absence.
- Supervises, trains and evaluates the performance of designated personnel; interviews and selects employees and recommends reassignment, termination and disciplinary actions; reviews work for accuracy, completeness and compliance with established requirements; may establish work schedules and assign employee duties; establishes and maintains time lines and priorities; ensures employee compliance with all safety rules and regulations.

EMPLOYMENT STANDARDS:

Knowledge of:

Methods, procedures and terminology used in administering a retirement system; principles and practices of governmental finance, accounting and budgeting; general investment concepts and practice for institutional investors; complex retirement, benefits or payroll software systems; principles and practices of management, administration, supervision and training; applicable laws, codes, regulations, policies and procedures; effective oral and written communication skills; interpersonal skills using tact, patience and courtesy.

Ability to:

Accurately read and understand complex documents (e.g., The Retirement Plan); interpret and apply the terms of complex documents; perform complex calculations of retirement benefits; prepare, analyze and monitor calculations based on the terms of complex documents; make detailed, accurate mathematical calculations; provide consultation concerning complex retirement plan administration issues; assist with banking and investment administration; prepare budget and other business administrative documents; supervise, train and evaluate the performance of designated personnel; communicate effectively both orally and in writing; make presentations to Boards, legislative bodies, professional associations, employee groups or other audiences; interpret, apply and explain rules, regulations, policies and procedures; establish and maintain cooperative and effective working relationships with others; perform complex quantitative analysis using Excel; meet schedules and timelines; operate standard office equipment including a computer and assigned software.

EDUCATION AND EXPERIENCE:

Education – Graduation from an accredited four-year college or university with a bachelor's degree in Business, Human Resources, Accounting, Finance, Management, Public Administration or a related field. An advanced degree and/or professional certification is preferred. Job-related experience may substitute for the required education on a year-for-year basis.

Experience - Five years of increasingly responsible professional level experience involving work with retirement systems, benefits administration, complex payroll systems or similar and including experience in a supervisory/management role. At least two years of the required experience shall include knowledge, usage or administration of complex retirement, benefit or payroll software systems.