



# The School Board of Polk County

<http://www.polk-fl.net>

## Job Description

Position Title: Specialist, Retirement  
FLSA Status: Exempt  
Salary Grade, if non-union: SG17  
Pay Grade, if union:  
Non-Union or Specific Collective Bargaining Agreement: Non-Union

### Our Mission:

The mission of Polk County Public Schools is to provide a high quality education for all students.

To perform this job successfully, the individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill and ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The duties are intended to describe the nature and level of work being performed by the employee assigned to the position. This job description is not meant to be construed as an exhaustive list of all responsibilities, duties, and skills required of this position. Other duties may be assigned which are not listed. Additionally, when duties and responsibilities of this job change, this job description will be reviewed and updated, subject to changes and business necessity.

### Custom Job Purpose:

This position exists to perform specialized work related to the retirement programs for the District.

### Essential Functions of this Job

Coordinates employee retirement through the Florida Retirement System (FRS). Administers the Deferred Retirement Option Program (DROP). Counsels with employees concerning timing of retirement, DROP, purchase of additional credit (military, leave of absence, refunded services, out-of-state), special School Board of Polk County retirement programs, payment of sick leave and vacation time, etc. Counsels employees by providing specific information related to pension and investment plan options. Researches employee files and data to verify years of service, military service, and leaves of absence data in order to complete retirement paperwork to forward to Tallahassee for certification. Counsels with retirees and beneficiaries on retirement and related issues. Processes requests for information and retirement applications. Communicates with the Division of Retirement in Tallahassee as needed. Provides district leadership with DROP exit data as needed to support staffing needs. Consults with the Payroll Department regarding retirement-related payroll information and procedures. Plans and conducts retirement planning seminars. Communicates with investment agents regarding the investment of employees' sick leave and vacation pay. Develops retirement-related communications for employees and retirees on FRS retirement options and other district sponsored retirement savings plans.

### Non-Essential Functions of this Job

Performs other duties as assigned.

Position Title: Specialist, Retirement

Knowledge, Skills and Abilities:

Considerable knowledge of the district's benefits, personnel, payroll, and finance procedures, and practices. Considerable knowledge of state and federal laws and regulations and School Board policies impacting retirement and equity issues. Ability to communicate effectively orally and in writing. Ability to use interpersonal skills in order to maintain effective working relationship. Knowledge of various computer applications, e.g., Word, Excel, and use of the Internet as well as district applications. Bilingual/biliterate preferred.

Education, Experience and/or Certification/License Requirements

A Bachelor's degree from an accredited four-year college or university or equivalent experience in an employee benefits or human resources related area. Experience in employee benefits or human resources preferred.

Work Context:

Requires some sitting and standing, walking and moving about to coordinate work. Requires the use of alternative communication systems, such as electronic mail, telephones and computers. Requires coordination of work tasks to establish priorities, set goals and meet deadlines. Requires face-to-face discussions and contact with individuals and/or teams. Requires work with internal and external contacts, and with the public.

Physical Environment:

Requires working indoors in environmentally controlled conditions. Requires sitting for the majority of the day, and the ability to lift, carry, move and/or position objects infrequently weighing up to 20 pounds.

Local Code: 10218  
EEO5: 44  
Approval Date: 2014-12-09  
Date Last Revised:

*The School Board of Polk County, Florida, prohibits any and all forms of discrimination and harassment based on race, color, sex, religion, national origin, marital status, age, homelessness, or disability or other basis prohibited by law in any of its programs, services, activities or employment.*