



City of Lakeland, Civil Service Retirement Services Manager

SALARY	\$87,583.96 - \$131,376.47 Annually	LOCATION	Employment Services, FL
JOB TYPE	Full Time Regular	JOB NUMBER	1094-01
DEPARTMENT	Retirement Services 0102000000	OPENING DATE	07/07/2025
CLOSING DATE	Continuous	FLSA	Exempt
BARGAINING UNIT NA			

GENERAL DESCRIPTION OF CLASS

This is highly responsible professional work involved in administering the City of Lakeland's employee retirement programs, consisting of defined benefit plans, defined contribution plans, deferred compensation programs, FICA Alternative plan, and the Health Reimbursement Plan. The position interacts and coordinates with the contracted Third Party Administrator for the Firefighters' and Police Officers' pension plans.

Serves as Secretary of the City of Lakeland Employee Pension Plan Board of Trustees ("Pension Board"). Duties are performed in conformance with pension and retirement laws, City Charter provisions, and City administrative policies, including detailed financial and participant reporting to the Pension Board and City management. The incumbent is expected to exercise considerable independent judgment in developing and administering a multi-faceted public retirement system. Work is subject to review through discussion and analysis of program accomplishments and is performed with decision-making under the general direction of the Pension Board and Finance Director. Incumbent interacts continuously with employees, department directors, and city management in a consultative capacity.

Please note this posting is "Continuous" and can close at ANY TIME WITHOUT NOTICE.

ESSENTIAL FUNCTIONS

- Plans, organizes, and directs all functions of the City's retirement programs, excluding Police and Fire pensions.
- Implements directives and policies of the Pension Board for general employees.
- Secures and provides the Pension Board with interpretations of the pension-related statutes, rules, and policies. Specific emphasis on Florida Statutes Chapters 112 and federal pension laws and regulations.
- Directs and/or facilitates the preparation and/or submission of all reports, including state-mandated actuarial evaluations, and audits of the various pension plans sponsored by the City.
- Develops requests for proposals for the procurement of Investment Managers, Financial Services, Custodial Services, Actuarial Services, and other services in support of the multifaceted Retirement System.
- Works in coordination with the Operations and Budget Committee to develop recommended policies implementing the specific provisions of the City pension plans and in the preparation and administration of the agency budget.
- Ensures accountability of expenditures and conformance to benchmarks established by the Pension Board.

- Works with legal counsel to provide input in the drafting of ordinances to effect necessary changes to the City's pension plans and retirement programs and, when required, directs the preparation of actuarial impact statements and submission to the appropriate State of Florida agencies.
- Reviews investment reports, investment management ADVs, monitors security trading activity, conducts due diligence reviews of investment-related service providers, and reports to the Pension Board as necessary.
- Develops and supervises financial planning, retirement planning, and health care savings employee education programs.
- Plans and reviews the work of a staff of professional employees.
- May be required to participate in and/or facilitate training to support departmental or City initiatives and requirements.
- May be required to work alternate hours as necessary for the efficient operation of the department or City.
- Position designated as Mission Critical.

ADDITIONAL FUNCTIONS:

- Performs special assignments and related work as required.

QUALIFICATIONS (EDUCATION, TRAINING AND EXPERIENCE)

- Bachelor's degree from an accredited four-year college or university in Finance, Accounting, Banking, Economics, Business Administration, or a related field.
- Five years of experience in progressively responsible pension plan administration and an in-depth understanding of pension investments.
- One year of supervisory experience.

An equivalent combination of education, training, and experience that provides the necessary knowledge, skills, abilities, and other competencies necessary for success in the target position may be considered.

SPECIAL REQUIREMENTS:

- Must possess and maintain a valid driver's license
- Must possess and maintain a valid telephone number.
- Must possess and maintain a certification as a Florida Public Pension Trustee within two years of appointment.

KNOWLEDGE, SKILLS, ABILITIES**KNOWLEDGE:**

- Extensive knowledge of public pension plan administration laws, regulations, principles, and practices of public pension plan administration.
- Extensive knowledge of municipal governmental functions and organizations.
- Extensive knowledge of investment principles, practices, and terminology
- Extensive knowledge of accounting procedures, actuarial concepts, and applications as applied to public pension systems.
- Knowledge of and ability to apply the provisions of Federal and State statutes related to public pension systems, including Chapter 112 of Florida Statutes.
- Thorough knowledge of modern office practices and procedures.

ABILITIES:

- Ability to communicate clearly and concisely both orally and in writing.
- Ability to establish and maintain effective working relationships with Pension Board members, city management, department directors, employees, retirees, and the public.
- Ability to plan, assign, and coordinate the activities of subordinates.
- Ability to analyze and make sound and prompt judgments in the decision-making process.

WORKING ENVIRONMENT/PHYSICAL REQUIREMENTS:

- Requires sedentary work that involves walking or standing sometimes, exerting up to 10 pounds of force regularly, and routine keyboard operations.
- The job has no significant exposure to environmental hazards.
- The job requires normal visual acuity, field of vision, hearing, speaking, color perception, sense of smell, depth perception, and texture perception.

All City of Lakeland positions are subject to testing (e.g. written, oral, performance, computerized, interview, and/or any combination). Candidates selected for testing will be notified via email or telephone. Please check your e-mail and telephone messages regularly, including "junk" folders. Test times and locations to be announced.

**THE CITY OF LAKELAND IS AN EQUAL OPPORTUNITY/EQUAL ACCESS EMPLOYER AND A DRUG FREE
WORKPLACE**

Benefits

**City of Lakeland
2024 Summary Sheet**

Annual Leave

Annual leave is accumulated bi-weekly and based upon years of service as follows:

Years of Service	Annual Leave
Less than five years	12 days per year
Five through fifteen years	15 days per year
More than fifteen years	20 days per year

Annual leave may be taken as earned by employees hired after January 1, 1989. Employees hired prior to that date use annual leave within the calendar year following the year the leave is earned. All employees may carry over up to a maximum of twenty (20) days at the end of the calendar year. Regular part-time employees who work at least twenty (20) hours per week accrue annual leave at the rate of four (4) hours per month.*

Sick Leave

Sick rate is accrued biweekly based upon years of service and standard hour classification. Eligible for use as soon as earned. Regular part-time employees who work at least twenty (20) hours per week accrue sick leave at the rate of four (4) hours per month.

***NOTE:** REGULAR employees with a working day other than eight (8) hours, please contact your supervisor regarding these policies.

Sick Leave Pool

Allows employees to receive sick leave benefits in cases involving catastrophic or long-term illnesses or injuries after all personal leave time has been depleted. Regular full-time employees contribute eight (8) hours and Regular part-time employees contribute four (4) hours on an annual basis. Employees must have completed one full year of service on or before December 31st of the calendar year enrollment; and have accumulated at least forty (40) hours of sick time (twenty (20) hours for Regular part-time employees). Participation in this program is voluntary.

For more information contact Amanda Kaiser at 834-8768

Family & Medical Leave

Federal legislation guarantees up to twelve (12) weeks per year off work under certain circumstances outlined in the policy manual. The employees must have been employed by the City for at least twelve (12) months and have at least 1,250 hours of service during the 12-month period before the requested leave. The City will continue its group life and

health insurance for an employee on leave at the same level and under the same conditions that existed while the employee was working.

For more information contact Dawn Justice at 834-6038.

Pension Plan

Provision for retirement income requiring mandatory participation for full-time regular employees.

Defined Benefit Plan:

Plan C Employee 4.16%

Employer 15.66%

OR

Defined Contribution Plan:

Executives, New Hires aged 52 and older, and Fire/Police Recruits

Employee 8.5% or 11% per election upon hire

Employer 15.39%

Deferred Compensation 457 Plan:

A voluntary plan that is invested in mutual funds. The Employees' Pension Board performs the due diligence on the mutual funds. Employees may reallocate their account at any time.

Maximum contribution for 2025 is \$23,500; employees age 50 or older can also add a "catch-up" amount of \$7,500; employees age 60-63 can also add a "catch-up" amount of \$11,250.

Additionally, a match of up to 5% of salary is offered by the City in Plan C.

Holidays

Twelve (12) holidays, includes one (1) personal floating holiday to be used at any time after three (3) months of employment and prior to the end of the calendar year.

Funeral Leave

Up to three (3) days off with pay due to death of an immediate family member (as defined in the policy manual). Up to four (4) hours off with pay may be obtained through supervisor approval to attend local funeral services of persons other than immediate family.

Jury/Witness Duty

Employees required to serve on jury duty will be relieved of responsibility for their regular work shift or portion thereof and receive full pay while serving. All fees received for such service may be retained by the employee. Employees subpoenaed to any civil or criminal court proceeding, which employee is not personally or monetarily interested, shall be paid as if engaged in regular work activities.

Military Leave

Allows for up to 240 hours in any one calendar year for annual military training without loss of pay or benefits for any employee in some type of reserve status for the United States Armed Forces. (see policy manual for additional information).

Maternity Leave

Refer to Family & Medical Leave for those employees who qualify. Others may take up to three (3) months leave of absence available upon approval of the Department Head. Employees may opt to utilize any combination of paid (sick or annual leave) or unpaid leave.

Leave of Absence Without Pay

Written requests are subject to approval by Department Head and City Manager or designee for less than ninety (90) days. Requests for more than ninety (90) days also require Civil Service Board approval for employees in a Civil Service classification.

Longevity Pay

Years of Service	Semiannual Payout	Annual Payout
10-14 years of service	\$120	\$240
15-19 years of service	\$180	\$360
20+ years of service	\$240	\$480

Tuition Reimbursement

Program provides employees up to \$2,500 per fiscal year (October 1 through September 30) for reimbursement of tuition of approved college, university, vocational, or correspondence classes upon completion with a grade of "C" or better in credit courses only. Full reimbursement is given for courses and fees, upon approval. The program does not include reimbursement for cost of books, supplies or other related expenses.

For more information, contact Melissa Yelnick at 834-6844.

Suggestion Awards

A program designed to provide a consistent and organized method for employees to submit and be rewarded for constructive ideas for improvement. Maximum award is \$1000.

For additional information, contact Employee Engagement and Development at 834-6837.

Direct Deposit of Paycheck (refer to handout in new employee folder)

An account must be established with the institution of your choice prior to signing up for direct deposit.

Uniforms/Equipment

Uniforms issued at no cost to employees for those job classifications which require them. Equipment is issued to employees at either no cost or discounted cost depending upon job classification.

Parking

Free while at work.

Break Periods

Employees may be permitted two (2), fifteen (15) minute breaks during the workday. The time shall be at the discretion of the supervisor.

For Information on Health Insurance, Dental, Vision, and Life Insurance please contact Benefits at 834-6797.

For Information on Retirement Benefits, contact the Retirement Services Department at 834-8765 or 834-8797.

For Information on Firefighter and Police Officer Retirement Benefits, contact Foster & Foster at 239-333-4872.

Employer

City of Lakeland, Civil Service

Address

500 N Lake Parker Avenue

Lakeland, Florida, 33801

Phone

(863)834-8790

Website

<http://www.lakelandgov.net/employmentservices>