THE STATE
of ALASKA
GOVERNOR SEAN PARNELL

Department of Administration

DIVISION OF PERSONNEL AND LABOR RELATIONS

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Memorandum

To: Nicki Neal
Director

Thru: Keith Murry
Class Studies Supervisor

From: Brandon Cullum
Human Resource Specialist II

Date: October 12, 2012

Subject: Retirement and Benefits Study – Retirement and Benefits Manager

Preamble:

Classification is reviewing the Retirement and Benefits Manager job class as the final phase of the Retirement and Benefits job class study. The following memo conveys the process and recommendations stemming from this job class' review.

Study Scope:

This study evaluates the single position (PCN 028030) currently allocated to the Retirement and Benefits Manager job class.

Study Contacts:

Primary contacts in the Division of Retirement and Benefits were Jim Puckett, Director, and Kathy Lea, Deputy Director. Additional information was provided by Bernadette Blankenship, Retirement and Benefits Manager.

History of Job Classes:

The Retirement and Benefits Manager job class was established in 1975 as Deputy Director, Retirement and Benefits (SR23). Until 1994, the only changes the class experienced were minimum qualification modifications intended to ease recruitment difficulties.

In 1994 the class was substantially changed to reflect the increasing importance of daily-operations oversight and the decreasing role of policy and strategic development. The class was re-titled Retirement and Benefits Manager, moved to the classified service, and kept at SR23.

Class Analysis:

The State's classification plan provides for the grouping of positions into job classes when they are sufficiently similar with respect to duties and responsibilities, degree of supervision exercised and received, and entrance requirements so that: 1) the same title can be used to clearly identify each position; 2) the same minimum qualifications for initial appointment can be established for all positions; 3) the same rate of basic pay can be fairly applied to all positions; and 4) employees in a particular class are considered an appropriate group for purposes of lay off and recall. Job classes should be constructed as broadly as feasible as long as the tests of similarity are met.

Until the creation of the Chief Financial Officer, Retirement and Benefits (CFO) job class during this study, the Retirement and Benefits Manager job class was a dual position class to which both of the Division's operational managers were allocated. With the removal of the CFO's financially-oriented body of work from the job class, the Retirement and Benefits Manager is now a single position job class with a specific focus on managing benefit provision to plan members.

The revised job class is defined as a single position job class and the principle manager of operations over the Division of Retirement and Benefit's Member Services Section.

Minimum Qualifications:

The minimum qualifications established for a job class must relate to the knowledge, skills, and abilities needed to perform the work and must not create an artificial barrier to employment of individuals in protected classes. Required training should be limited to the basic formal training that customarily prepares individuals for work in the field. Experience requirements are intended to ensure new employees can successfully perform the work after a period of orientation or familiarization. Required experience should be directly related to the actual duties of positions in the class and should not be equivalent to the work performed.

Removing the CFO's financial body of work from this job class changed the job class' knowledge, skill and ability requirements, which have direct impact on the scope of minimum qualifications. The revised minimum qualifications now specifically target high-level business operations, employee relations, and benefits-related experience.

Minimum Qualifications
Three years of experience as a Retirement and Benefits Specialist III, Human Resource Specialist III, Budget Analyst IV, or Accountant IV with the State of Alaska or the equivalent elsewhere, where at least one year of the experience required the application of supervisory authority over professional staff. OR Two years of experience as a Human Resource Manager I, Accountant V, or Administrative Operations Manager with the State of Alaska or the equivalent elsewhere. Substitution: A master's degree in Public Administration, Business Administration, Accounting, or Finance from an accredited college will substitute for one year of the required experience.

Class Outline:

A Class Code is assigned based on the placement of the job class in the classification schematic of Occupational Groups and Job Families. Occupational Groups are made up of related Job Families and encompass relatively broad occupations, professions, or activities. Job Families are groups of job classes and class series that are related as to the nature of the work performed and typically have similar initial preparation for employment and career progression.

The Retirement and Benefits Manager job class remains in the Personnel and Employee Relations (PB03) job family.

Job Class	Class Code	AKPAY Code
Retirement and Benefits Manager	PB0345	P1447

Fair Labor Standards Act

The positions in this study are covered by the minimum wage and maximum hour provisions of the Fair Labor Standards Act of 1938, as Amended (FLSA). While exemption from the provisions of the Act are based on the specific circumstances of an individual employee on a work-week basis, there are general aspects of the classes and their influence on the exemptions for employees in bona fide executive, professional, or administrative positions that can be addressed in general.

- The incumbent of the Retirement and Benefits Manager job class is overtime exempt under the terms of the Administrative and Executive Exemptions as set forth in the Act

Administrative Exemption

- The incumbent is paid in excess of the minimum wage requirement
- The incumbent provides professional-level employee relations support on behalf of the Division and as such perform non-manual work directly related to the management or general business operations of the employer or the employer's customers
- The incumbent exercises discretion and independent judgment with respect to matters of significance when they establish division-wide operations procedures, establish the Division's service metrics, interpret and clarify statute and ambiguous policy, develop service models, represent the department to outside boards and vendors, and supervise the Division's operations staff

Executive Exemption

- The incumbents is paid in excess of the minimum wage requirement
- As an officer in charge of the Division's member service operations and staff, the incumbent's primary duty is the management of the enterprise in which the employee is employed or of a customarily recognized department or subdivision thereof
- The incumbent has the authority to hire or fire other employees or make suggestions and recommendations as to the hiring, firing, advancement, promotion or any other change of status of other employees that are given particular weight

Salary Analysis:

The salary range of a job class is determined based on internal consistency within the State's pay plans, in accordance with merit principles, with the goal of providing fair and reasonable compensation for services rendered and maintaining the principle of like pay for like work. In evaluating internal consistency the difficulty, responsibility, knowledge, skills, and other characteristics of a job are compared with job classes of a similar nature, kind, and level in the same occupational group and job family or related job families. To this end, this salary alignment compares the subject class to the most relevant comparable classes within the Personnel and Employee Relations (PB03) job family, using the framework provided by the eight classification factors:

- Nature, variety, and complexity
- Nature of supervision received
- Nature of available guidelines
- Initiative and originality
- Purpose and nature of person-to-person work relationships
- Nature of scope of recommendations, decisions, commitments, and consequence of error
- Nature and extent of supervision exercised over the work of other employees
- Qualifications required

The following table illustrates each comparable class's defining characteristics and the general characteristics of each applicable range within the family.

Range	Job Class	Description	Range Characteristics
22	Human Resource Manager I	Manages a single statewide human resource program	Manager over a single division service
23	Human Resource Manager II	Manages the delivery of a broad body of statewide human resource programs	Manager over multiple division services
24	Labor Relations Manager	Manages the State's labor relations capacity	Manager of highly skilled professionals providing a complex service

The Retirement and Benefits Manager is responsible for maintaining the efficient and effective delivery of a wide variety of services, which together constitute a significant portion of the Division of Retirement and Benefits' total service array. Among comparable classes, the Retirement and Benefits Manager bears a level of responsibility that is most comparable to the PB03 family's range 23 characteristics -- the incumbent of the class manages multiple division services through multiple subordinate high-level professionals, who in turn each manage a diverse body of professional, technical, and clerical staff to maintain operations in their discrete service areas.

The Retirement and Benefits Manager continues to be aligned to salary range 23 in the Personnel and Employee Relations (PB03) job family.

Conclusions:

Class Structure and Salary Alignment

- Updated: Retirement and Benefits Manager
- Salary Range: SR23

General Interpretation of an Incumbent's FLSA Eligibility

- Overtime ineligible

The preceding job class establishment and subsequent position allocations are effective October 12, 2012.

Attachment:
Final class specifications

cc: Jim Puckett, Director
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Cheri Lowenstein, Director
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