

ATTACHMENT B

**PROPOSED CLASS SPECIFICATION FOR
SBCERS DISABILITY RETIREMENT MANAGER**

COUNTY OF SANTA BARBARA
SBCERS DISABILITY RETIREMENT MANAGER

EST. XX.25

DEFINITION:

Under general direction, the Disability Retirement Manager oversees the Santa Barbara County Employees' Retirement System (SBCERS) Disability Retirement program, managing staff, operations, and investigations of disability retirement cases. This role is responsible for ensuring proper administration of cases, conducting complex investigations, developing policies and procedures, directing hearing counsel, and making recommendations to the SBCERS Chief Executive Officer (CEO) on disability related issues matters. Performs related duties as required.

DISTINGUISHING CHARACTERISTICS:

The Disability Retirement Manager is distinguished from the Disability Retirement Analyst in that the former manages the entire SBCERS Disability Retirement program, including strategic decision-making, policy development, budget planning, and supervision of staff. The Disability Retirement Manager also handles the most complex and sensitive disability cases and ensures compliance with the County Employees Retirement Law of 1937 (CERL).

SUPERVISION RECEIVED AND EXERCISED

Reports to the SBCERS CEO. Provides direct supervision to employees in the SBCERS Disability Retirement program.

Examples of Duties

These examples are not intended to reflect all duties performed within the job.

1. **Program Management and Leadership.** Directs the daily operations of the Retirement Disability program; supervises paraprofessional and professional staff, including hiring, training, assigning tasks, and evaluating performance; supports staff in setting and achieving performance goals and deadlines, ensuring accountability and efficiency; establishes performance measures and ensures compliance with relevant policies and regulations; provides analytical and technical expertise to staff and ensures adherence to federal, state, and local laws, policies, procedures, and fiduciary duties.
2. **Policy Development and Compliance.** Develops, revises, and implements disability retirement administrative, investigative, and hearing policies and procedures; identifies opportunities for process improvement and implements innovative solutions to enhance efficiency, accuracy, and service delivery; interprets and explains the CERL and retirement standards to stakeholders; advises the CEO on disability retirement policies, reasonable accommodation issues, and legislative changes; and represents SBCERS in statewide retirement associations and committees.

3. **Financial and Statistical Analysis.** Researches, compiles, and analyzes disability retirement data for executive reporting; prepares statistical and narrative reports for the CEO and Board of Retirement; oversees and approves budgetary expenditures, projections, and fiscal planning; develops communications for SBCERS members regarding disability benefits.
4. **Case Oversight and Management.** Reviews staff work on assigned cases and approves investigation strategies; assigns cases to hearing counsel and collaborates on litigation strategies; monitors hearing counsel performance and evaluates billings requests; conducts legal research, drafts legal documents, and ensures compliance with filing requirements.
5. **Processing of Complex Disability Cases:** Leads the investigation and resolution of highly complex or sensitive disability cases; analyzes intricate medical, legal, and employment factors impacting disability determinations; ensures cases adhere to statutory requirements under the CERL; works with hearing counsel, medical professionals, and agency stakeholders to develop sound and fair case resolutions.

Employment Standards

Education and Experience

The knowledge, skills, and abilities listed below may be acquired through various types of training, education, and experience. A typical way to acquire the required knowledge and abilities would be:

- Equivalent of a bachelor's degree from an accredited four-year college or university in legal studies, business administration, public administration, management, benefits administration; and,
- Five (5) years of progressively responsible administrative or investigative experience in a related field, including at least two (2) years as a supervisor or manager.

Additional qualifications:

1. Must possess and maintain a valid California driver's license and meet automobile insurability requirements of the County, or have other suitable means of transportation, as a condition of continued employment.
2. Must obtain a paralegal or legal assistant certificate approved by the State Bar of California or American Bar Association within three years of employment.

Knowledge of: the County Employees Retirement Law of 1937; disability retirement standards, principles, precedents, and clarifications as established by case law; SBCERS Board of Retirement procedures; reciprocal disability retirement procedures with other 1937 Act counties; legal procedures, concepts, filing requirements, documents, and document control techniques; legal and medical/legal terminology; retirement, California Workers Compensation, Americans with Disabilities Act, Social Security Disability, and administrative law; information gathering and legal research techniques; interviewing, deposition, and group presentation techniques; business math and statistical analysis; business and legal writing formats; and English usage, grammar, and spelling.

Ability to: train, supervise, and evaluate staff performance effectively; research, compile, and analyze disability retirement case data; interpret and apply federal, state, and local laws related to disability retirement; draft and present recommendations professionally in written and oral formats; manage case files, coordinate legal process, and ensure compliance; communicate effectively with stakeholders, including elected officials, attorneys, and board members; and maintain confidentiality of sensitive applicant information.

DESIRABLE QUALIFICATIONS: Experience managing a governmental program or unit, including supervision of staff, and experience working in a legal or medical office setting.

Additional Class Information

Class # 8711

EEOC 1

Medical: A

Vts Pts: No

Bargaining Unit: 43

Est: XX/25