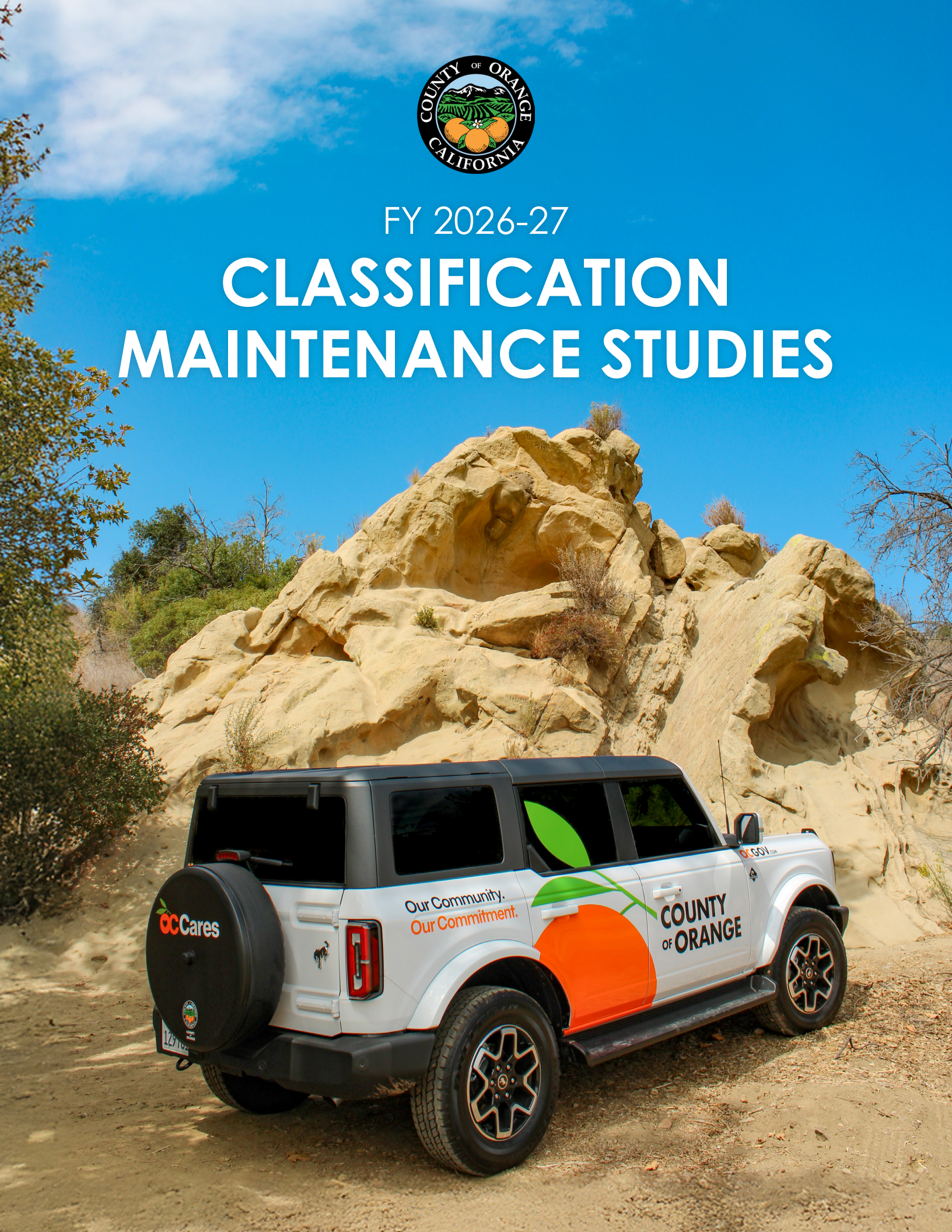
FY 2026-27

CLASSIFICATION MAINTENANCE STUDIES



Acknowledgement

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Location: Irvine Regional Park, OC Parks

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FY 2026-27 CLASSIFICATION MAINTENANCE STUDIES

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RECOMMENDED ACTIONS – CLASSIFICATION MAINTENANCE STUDIES

9. Effective October 2, 2026, approve revised classification specifications and adjust pay grades for Engineer/Architect Assistant (Title Code 1841GE), Professional Engineer/Architect (Title Code 1842GE), and Senior Professional Engineer/Architect (Title Code 1843SM); including recruiting step adjustment for Engineer/Architect Assistant (Title Code 1841GE); delete Junior Engineer/Architect (Title Code 1840GE) and direct Human Resource Services to remove the obsolete classification from all Orange County Plan documents.

10. Effective October 2, 2026, approve revised classification specifications and adjust pay grades for Retirement Services Technician I (Title Code 0860GE), Retirement Services Specialist (Title Code 0862GE), Sr. Retirement Services Specialist (Title Code 0863GE), Disability Retirement Investigator (Title Code 6570GE), and Retirement Services Supervisor (Title Code 0864SM); including revised title descriptions for all classifications except Disability Retirement Investigator (Title Code 6570GE); approve and adopt new classification specification and set pay grade for Retirement Services Technician II (Title Code 0861GE); delete Retirement Benefits Specialist I (Title Code 0828GE), Retirement Benefits Specialist II (Title Code 0826GE), Retirement Administrative Services Supervisor (Title Code 9115SM) and direct Human Resource Services to remove the obsolete classification from all Orange County Plan documents.

COUNTY OF ORANGE
CALIFORNIA

BACKGROUND INFORMATION:

With Board approval of the current Memoranda of Understanding between the Orange County Employees Association (OCEA) and the County of Orange (County), along with requests by County departments and Orange County Employees Retirement System (OCERS), Human Resource Services (HRS) conducted multiple classification maintenance studies. Included for Board consideration and approval are a variety of recommendations impacting the pay ranges, recruiting steps, title codes, title descriptions, and class specifications for the Engineering/Architect series and the OCERS Retirement Services series.

The goal of the maintenance studies was to update the classification specifications, review the organizational structure of the occupational series, and evaluate the current salaries in relation to comparable public employer organizations. The maintenance study ensures that the job descriptions, working conditions, and minimum qualifications are accurate, and compensation is fair and competitive.

Maintenance Study Process

The maintenance study process involves analysis to identify the need to create, modify, or delete classifications, update, or create job duties described in classification specifications, identify necessary changes to minimum qualifications, and delineate the physical, environmental, and mental characteristics of a classification. HRS reviews comparable classification specifications from local jurisdictions and collaborates with department management, subject matter experts, and labor organizations to review and update existing classification specifications. Changes to classification specifications ensure that: the duties and levels of responsibility are current; the classification occupational series have the appropriate structure to meet departmental workload demands in an efficient manner; and minimum qualifications are at an appropriate level to attract candidates with the necessary skills, knowledge, and abilities to perform the expected duties.

The market salary study and analysis consist of identifying comparators from surrounding public agencies to determine if current salaries are consistent with market salary averages. If it is determined that the minimum salary of a proposed pay grade is below the average within the market or is below the previously advertised minimum salary for the classification, an advanced recruiting step may be requested. HRS analyzes data from previous recruitments and internal employee separation reports and reviews current staffing levels to determine if current salaries affect employee recruitment and retention.

In addition to identifying comparable salaries, comparators' current labor agreements are reviewed to identify and consider additional premium pay, allowances, and future negotiated salary adjustments offered by comparators.

Engineer/Architect Series

Positions in this series perform a variety of projects utilizing specialized engineering and/or architectural knowledge. Duties include planning, designing, and reviewing construction of projects related to airports, landfills, and other public works. Positions also perform professional engineering and project management functions within specialized areas, such as airport infrastructure, operations, and environmental programs, or solid waste management and environmental operations. These classifications are assigned to John Wayne Airport (JWA), Orange County Waste & Recycling (OCWR), and the Orange County Sheriff's Department (OCSD).

HRS conducted a market salary survey and determined that the Professional Engineer/Architect classification is 4.07% percent above the market average based on the benchmark comparator agencies. However, because the series is also assigned to JWA and OCWR, where positions perform specialized functions, HRS expanded the comparator pool to include airport and industry-specific agencies, such as the Port of Oakland, San José International Airport, and Sacramento International Airport (County of Sacramento). Using the expanded comparator pool, HRS determined that the Professional Engineer/Architect classification is 2.00% percent below the market average. The following table displays a comparison of salaries from surrounding organizations for the classification equivalent to the Professional Engineer/Architect (journey-level).

Organization	Title Description	Max Monthly Pay
Port of Oakland	Port Associate Engineer	$15,322
San Jose International Airport	Associate Engineer	$14,342
County of Sacramento *(Sacramento International Airport)*	Associate Engineer/Architect	$13,288
City of Long Beach	Electrical Engineer	$12,685

Organization	Title Description	Max Monthly Pay
County of San Bernardino	Engineer III	$12,508
County of Ventura	Engineer III	$12,248
County of Los Angeles	Architect	$12,089
City of Los Angeles	Electrical Engineering Associate III	$11,728
	Average Monthly Maximum	**$13,026**
County of Orange	***Professional Engineer/Architect***	***$12,770***
	Variance Below Market Average	**-2.00%**

Based on the external market, internal equity analysis, and assessment of the existing classification structure, HRS recommends revising the classification specifications and adjusting the pay grades and recruiting step for the Engineer/Architect Assistant, Professional Engineer/Architect, and Senior Professional Engineer/Architect and approve the deletion of the Junior Engineer/Architect classification and set the pay grade as follows:

Current			Proposed		
Title Code	**Title Description**	**Pay Grade & Monthly Range**	**Title Code**	**Title Description**	**Pay Grade & Monthly Range**
1840GE	Junior Engineer/ Architect	A3-61 $8,072 - $9,235	Delete Classification		
1841GE	Engineer/ Architect Assistant	A3-65 $9,002 - $10,275 (Recruiting Step 7)	1841GE	Engineer/ Architect Assistant	C-41 $9,057 - $10,658 (Recruiting Step 6)
1842GE	Professional Engineer/ Architect	A3-73 $11,148 - $12,770	1842GE	Professional Engineer/ Architect	C-48 $11,251 - $12,887
1843SM	Senior Professional Engineer/ Architect	A3-78 $12,770 - $14,643	1843SM	Senior Professional Engineer/ Architect	C-53 $12,887 - $14,761

Per the recommendations above, the proposed changes will increase salaries for the Engineer/Architect series and improve the County's market standing amongst the comparator agencies. This recommendation also transitions the series from the A3-schedule to the C-schedule, consistent with the agreement with OCEA, and would

address the 2% below market average. In addition, HRS recommends deleting the entry-level classification within the series, Junior Engineer/Architect, as the classification has not been utilized by departments in the last 10 years. The proposed deletion will not have an impact on current employees as there are no budgeted positions or incumbents in these classifications.

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed	
Position Count	**Title Description**	**Position Count**	**Title Description**
0	Engineer/Architect Assistant	0	Engineer/Architect Assistant
4	Professional Engineer/Architect	4	Professional Engineer/Architect
2	Senior Professional Engineer/Architect	4*	Senior Professional Engineer/Architect
6	**Total**	**8**	**Total**

*OCWR & OCSD positions currently budgeted at classifications outside the series; position count to change following position reallocations to resolve temporary fills.

With all positions filled, the departments will absorb the approximate $15,555 annual cost of implementing the proposed changes as follows:

Agency	Approximate Annual Cost	Funding Source	Approximate Net County Cost
JWA	$11,453	100% - Other	$0
OCWR	$2,051*	100% - Other	$0
OCSD	$2,051*	20% - NCC 80% - State	$398
Total	**$15,555**	**Total**	**$398**

* OCWR & OCSD positions currently budgeted at classifications outside the series

<u>OCERS Retirement Services Series</u>

Positions in the Retirement Services Program series are responsible for performing a full range of retirement benefits functions in support of the Orange County Employees Retirement System (OCERS), including counseling members and beneficiaries; interpreting applicable laws and regulations; researching and resolving benefit claims and

inquiries; and calculating and verifying retirement benefits. Responsibilities span from administering retirement, disability, death, and deferred benefits to maintaining member accounts, coordinating reciprocal benefits, processing complex claims and benefit transactions, supporting retiree payroll and withdrawals, and analyzing actuarial data in compliance with applicable laws, regulations, and system requirements.

HRS conducted a market salary survey and determined that the Retirement Program Specialist classification is 5.80% below the market average. The following table displays a comparison of salaries from surrounding Southern California retirement systems and California Public Employees' Retirement System (CalPERS) for classifications equivalent to the Retirement Program Specialist (journey-level):

Organization	Title Description	Max Monthly Pay
San Bernardino County Employees' Retirement Association (SBCERA)	Retirement Specialist	$8,920
Los Angeles City Employees' Retirement System (LACERS)	Benefits Specialist	$8,829
Los Angeles County Employees Retirement Association (LACERA)	Retirement Benefits Specialist II	$7,257
San Diego County Employees Retirement Association (SDCERA)	Retirement Member Services Specialist	$7,030
California Public Employees' Retirement System (CalPERS)	Retirement Program Specialist I	$6,276
Ventura County Employees' Retirement Association (VCERA)	Technical Specialist III-MB	$6,117
San Diego City Employees' Retirement System (SDCERS)	Retirement Assistant	$5,460
	Average Monthly Maximum	**$7,072**
OCERS	***Retirement Program Specialist***	***$6,684***
	Variance Below Market Average	**-5.80%**

HRS conducted a market salary survey and determined that the pay range for Retirement Services Program Supervisor was 29.59% below the market average. The following table displays a comparison of salaries from surrounding Southern California retirement

systems and CalPERS for classifications equivalent to the Retirement Services Program Supervisor (supervisory level):

Organization	Title Description	Maximum Monthly Pay
Los Angeles City Employees' Retirement System (LACERS)	Senior Benefits Analyst	$14,327
San Bernardino County Employees' Retirement Association (SBCERA)	Retirement Specialist Supervisor	$14,056
Los Angeles County Employees Retirement Association (LACERA)	Senior Retirement Benefits Specialist	$10,049
California Public Employees' Retirement System (CalPERS)	Retirement Program Specialist II (Supervisor)	$8,106
	Average Monthly Maximum	**$11,006**
OCERS	***Retirement Benefits Program Supervisor***	***$8,493***
	Variance Below Market Average	**-29.59%**

Based on the external market, internal equity analysis, recruitment data, and assessment of the existing classification structure, HRS requests approval to revise the classification specifications, title descriptions, and adjust the pay grades for the Retirement Services series (excluding title description revision for Disability Retirement Investigator), and to approve and adopt the creation of Retirement Services Technician II classification to provide career progression within the series, as follows:

Current			Proposed		
Title Code	**Title Description**	**Pay Grade & Monthly Range**	**Title Code**	**Title Description**	**Pay Grade & Monthly Range**
0860GE	Retirement Benefits Technician	A3-40 $3,961 – $5,257	0860GE	Retirement Services Technician I	C-21 $4,597 – $6,193
			0861GE	Retirement Services Technician II	C-23 $4,854 – $6,540
0862GE	Retirement Program Specialist	A3-49 $4,994 – $6,684	0862GE	Retirement Services Specialist	C-28 $5,557 – $7,488

Current			Proposed		
0863GE	Senior Retirement Program Specialist	A5-53 $5,685 - $7,602	0863GE	Sr. Retirement Services Specialist	C-35 $6,720 - $9,057
6570GE	Disability Retirement Investigator	A5-53 $5,685 - $7,602	6570GE	Disability Retirement Investigator	C-35 $6,720 - $9,057
0864SM	Retirement Benefits Program Supervisor	A5-57 $6,311 – $8,493	0864SM	Retirement Services Supervisor	C-40 $7,694 – $10,372

A comprehensive market salary survey and internal equity analysis conducted by HRS found compensation for the Retirement Servies series was below market averages across all levels of the classification. Findings indicated that Orange County's pay rates lagged the market maximum average by 4.72% at the entry level, 5.80% at the journey level, 12.50% at the senior level, and 29.59% at the supervisory level. To address these deficiencies and better position the County to be more competitive within the market, HRS recommends the salary adjustments shown above. These changes would increase minimum and maximum rates to place all classifications at or above their respective market averages, strengthening OCERS' ability to attract and retain qualified Retirement Services professionals in support of their operations.

As part of an expanded scope of the study beyond the initial retirement classifications, HRS conducted an assessment of the duties performed by the Office Specialist and Accounting Technician classifications within the Member Services division. Based on this review, HRS recommends reallocating one (1) Office Specialist position and six (6) Accounting Technician positions to the newly established Retirement Services Technician II classification. This recommendation does not introduce new duties or responsibilities. Rather, it realigns existing work currently performed under generic County classifications to classifications that more accurately reflect the level and nature of the work being performed and provides better alignment with the Retirement Services occupational series.

In addition, HRS recommends deleting the Retirement Benefits Specialist I (0828GE), Retirement Benefits Specialist II (0826GE), and Retirement Administrative Services Supervisor (9115SM), as these classifications have not been utilized in more than 10 years. There are no budgeted positions in these classifications, and the proposed deletions will not have any negative impact.

The following table provides a position summary following approval of the proposed changes:

Currently Budgeted		Proposed	
Position Count	**Title Description**	**Position Count**	**Title Description**
4	Retirement Benefits Technician	4	Retirement Services Technician I
1	Office Specialist	7	Retirement Services Technician II
6	Accounting Technician		
21	Retirement Program Specialist	21	Retirement Services Specialist
7	Senior Retirement Program Specialist	7	Sr. Retirement Services Specialist
3	Disability Retirement Investigator	3	Disability Retirement Investigator
6	Retirement Benefits Program Supervisor	6	Retirement Services Supervisor
48	**Total**	**48**	**Total**

If all positions are filled, OCERS will absorb the approximate $1,017,361 annual cost of implementing the proposed changes as follows:

Classification Title	Approximate Annual Cost	Funding Source*	Approximate Net County Cost
Retirement Services Technician I	$70,170	100% Other	$0
Retirement Services Technician II	$63,976	100% Other	$0
Retirement Services Specialist	$377,266	100% Other	$0
Sr. Retirement Services Specialist	$203,256	100% Other	$0
Disability Retirement Investigator	$84,010	100% Other	$0
Retirement Services Supervisor	$218,683	100% Other	$0
Total	**$1,017,361**	**Total**	**$0**

ENGINEER/ARCHITECT ASSISTANT

Bargaining Unit: GE General

Class Code: 1841GE

COUNTY OF ORANGE
Established Date: September 13, 2005
Revision Date: October 2, 2026

DEFINITION:

Under supervision, performs a variety of projects in the field or in an office utilizing specialized engineering and/or architectural knowledge plans, designs and reviews construction of projects related to airport, landfill and other public works projects; performs professional engineering and project management tasks in a particular specialty, such as airport infrastructure/operations or solid waste management/environmental operations. The series differs from the Civil Engineering series in that it allows for the use of engineers licensed in a wide variety of specialties.

The Engineer/Architect series includes the following:
Engineer/Architect Assistant (1841GE)
Professional Engineer/Architect (1842GE)
Senior Professional Engineer/Architect (1843SM)

CLASS CHARACTERISTICS:

This is the experienced, non-registered professional engineering level in the series. Positions at this level are distinguished from Junior Professional Engineer/Architect by their journey-level assignments and responsibility for independent engineering/architectural analysis and recommendations. Positions at this level generally work under the project leadership of a Professional Engineer/Architect and are assigned all but the most complex or specialized assignments.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Designs and prepares drawings, specifications and estimates for construction and maintenance of a wide variety of engineering projects in any of the specialized engineering areas.

2. Performs high-level professional engineering and/or design work in connection with cost analysis, progress reports and research or other specialized technical studies.

3. For airport assignments, projects may include specialized tasks related to the development, construction, reconstruction, alteration and/or maintenance of the airport terminal, the airfield, and related airport facilities as well as buildings, roadways, bridges and drainage structures, sewer systems,

water distribution systems, electrical systems, traffic control devices, etc.

4. For landfill assignments, projects may include specialized tasks related to drainage structures, access roads, surface water and ground water monitoring systems, landfill gas monitoring systems, landfill gas and leachate control systems.

5. Prepares requests for proposal, scopes of work and contract specifications for design and construction services; participates in the selection of consultants and design firms, and negotiates contracts and change orders. Directs the preparation of project designs, prepares independent cost estimates, project specifications and project schedules.

6. Manages projects through planning, scheduling and monitoring critical milestones to ensure projects are completed on time and within budget. Reviews progress payment requests submitted by contractors and consultants for contract compliance, and to ensure billing reflects work completed; approves invoices for payment.

7. Makes engineering calculations in connection with field and office assignments; prepares cost estimates for public works construction projects.

8. May use computer technology to solve engineering problems, create project designs.

9. May function as lead over other professional and sub-professional engineering staff in the performance of various tasks in one or more engineering specialty areas.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Depending upon assignment, principles and practices of architecture and/or engineering for the field of specialty assignment

- Analysis of statistically determinant and indeterminate structures

- Mathematics, including algebra, trigonometry and physics and their application to engineering

- Strengths, properties and uses of engineering construction materials; building construction practices, methods and materials

- Project/construction management including scheduling, change management, cost control; engineering mathematics/economics, including facility life-cycle costs assessment

- Federal, State and local building codes, ordinances, advisory circulars, and regulations pertinent to department operations

Ability to

- Prepare or direct the preparation of a variety of complex engineering or architectural designs, plans, specifications and technical reports

- Oversee/manage complex construction contracts and direct the work of contract staff performing those projects

- Establish and maintain effective working relationships with managers, co-workers, subordinates, contractors, representatives of other County and government agencies and business entities, and members of the Board of Supervisors and various commissions with advisory or oversight roles in the area of specialty assignment

- Effectively and efficiently carry out complex assignments with minimal supervision

- For the Professional Engineer/Architect Level: Plan, organize and lead the work of engineers, architects, technical staff and contract professionals on a variety of complex engineering or architectural projects; may be required for some assignments

Education and Experience

Graduation from an accredited college with major work in engineering.

Or

Possession of a valid certificate as an Engineer in Training issued by the California State Board of Registration for Civil and Professional Engineers.

Or

Certification in an Intern Development Program with the California Architects Board.

And

One year of engineering/architectural experience subsequent to college graduation or subsequent to receipt of an EIT/IDP certificate, which demonstrates a general knowledge and proficiency in the area of specialty assignment.

Receipt of a Master's Degree in a related engineering/architectural field may be substituted for the required experience.

License/Certification

For some positions, possession of a valid California Driver's license, Class C or higher, may be required by date of appointment.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

Employees must clear background check, which includes a Criminal History Records Check (CHRC), Transportation Security Administration (TSA) check and Security Threat Assessment (STA) check. Possession of, or ability to obtain, a valid Airport Access Badge with an Airport Driving Endorsement within ten (10) days of employment. Airport Access Badge with Airport Driving Endorsement must be maintained.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Ability to work in a typical office setting, and to use standard office equipment, including using hands, arms and shoulders repetitively to operate a keyboard and to write; work may require body mobility, strength and stamina to infrequently perform physical activities such as inspecting various construction projects and facilities, walking on uneven terrain and traversing hills and/or construction sites; vision sufficient to read printed materials including blueprints and computer screens; hearing and speech sufficient to communicate clearly and effectively in person, to groups of people, over the phone and by radio. Some assignments may require infrequent walking, standing, climbing, bending, stooping and kneeling. Mobility to drive a motor vehicle in order to attend off-site meetings and visit work sites may be required for some assignments.

Environmental and Working Conditions

Work is typically performed in an office environment but may infrequently require work in an outdoor environment Work may require infrequently performing tasks in environments with loud noises, fumes, or foul odors. Work may also involve exposure to uneven terrain, hills, construction sites, and other variable or potentially challenging site conditions. Some assignments may require travel between work locations, including operating a motor vehicle to attend off-site meetings and inspect work sites.

PROFESSIONAL ENGINEER/ARCHITECT

Bargaining Unit: GE General

Class Code: 1842GE

COUNTY OF ORANGE
Established Date: September 13, 2005
Revision Date: October 2, 2026

DEFINITION:

Under minimal supervision, performs a variety of projects in the field or in an office utilizing specialized engineering and/or architectural knowledge plans, designs and reviews construction of projects related to airport, landfill and other public works projects; performs professional engineering and project management tasks in a particular specialty, such as airport infrastructure/operations/environmental or solid waste management/environmental operations; and performs other work as required.

The Engineer/Architect series includes the following:
Engineer/Architect Assistant (1841GE)
Professional Engineer/Architect (1842GE)
Senior Professional Engineer/Architect (1843SM)

CLASS CHARACTERISTICS:

This is the professional engineer/architect level in the series and differs from the Assistant level by the requirement for state registration as a professional engineer by the California State Board of Registration for Professional Engineers, Land Surveyors, and Geologists, or licensure by the California Architects Board. Incumbents may be assigned as lead to other engineering/architect staff and/or provide direction to contract staff, and is required to independently perform complex or specialized assignments, provide project leadership, train staff, and consult in the area of specialty. Incumbents may independently review, complete and approve County designed plans as the responsible engineer. This classification differs from the Civil Engineering series in that it allows for the use of engineers licensed in a wide variety of specialties.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Designs and prepares drawings, specifications and estimates for construction and maintenance of a wide variety of engineering projects in any of the specialized engineering areas.

2. Performs high-level professional engineering and/or design work in connection with cost analysis, progress reports and research or other specialized technical studies.

3. For airport assignments, projects may include specialized tasks related to the development, construction, reconstruction, alteration and/or maintenance of the airport terminal, the airfield, and

related airport facilities as well as buildings, roadways, bridges and drainage structures, sewer systems, water distribution systems, electrical systems, traffic control devices, etc.

4. For landfill assignments, projects may include specialized tasks related to drainage structures, access roads, surface water and ground water monitoring systems, landfill gas monitoring systems, landfill gas and leachate control systems.

5. Prepares requests for proposal, scopes of work and contract specifications for design and construction services; participates in the selection of consultants and design firms, and negotiates contracts and change orders. Directs the preparation of project designs, prepares independent cost estimates, project specifications and project schedules.

6. Manages projects through planning, scheduling and monitoring critical milestones to ensure projects are completed on time and within budget. Reviews progress payment requests submitted by contractors and consultants for contract compliance, and to ensure billing reflects work completed; approves invoices for payment.

7. Makes engineering calculations in connection with field and office assignments; prepares cost estimates for public works construction projects.

8. May use computer technology to solve engineering problems, create project designs.

9. May function as lead over other professional and sub-professional engineering staff in the performance of various tasks in one or more engineering specialty areas.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Depending upon assignment, principles and practices of architecture and/or engineering for the field of specialty assignment

- Analysis of statistically determinant and indeterminate structures

- Mathematics, including algebra, trigonometry and physics and their application to engineering

- Strengths, properties and uses of engineering construction materials; building construction practices, methods and materials

- Project/construction management; cost control; and economics

- Federal, State and local building codes, ordinances, advisory circulars, and regulations pertinent to department operations

- Software systems for Engineering design analysis, computer-aided design and drafting, and project management applications

- Microsoft Office Suite and various engineering project management and document control systems

- Construction industry standards, materials, practices, and methods as it relates to mechanical, electrical, environmental, or civil engineering fields

Ability to

- Prepare or direct the preparation of a variety of complex engineering or architectural designs, computations, analysis, studies, plans, specifications, scopes of work, and technical reports

- Plan, organize and lead the work of engineers, architects, technical staff and contract professionals on a variety of complex engineering or architectural projects; may be required for some assignments

- Oversee/manage complex construction, and Architects/Engineers and other consulting contracts and direct the work of contract staff performing those projects

- Establish and maintain effective working relationships with managers, co-workers, subordinates, contractors, representatives of other County and government agencies and business entities, and members of the Board of Supervisors and various commissions with advisory or oversight roles in the area of specialty assignment

- Effectively collaborate with multiple stakeholders to understand customer/stakeholders' needs and solve complex technical issues

- Communicate persuasively in both written and oral forms to technical and non-technical audiences

- Coherently analyzes and presents cases for and against given approaches for accomplishing business objectives and/or project needs based on available information and circumstances, while supporting such analysis with clear, concise, and accurate reasoning and justification

- Carry out complex assignments with minimal supervision

- Apply project management industry standards and practices in the areas of project planning, coordinating, budget management, scheduling, and monitoring.

Education and Experience

Two (2) years of responsible and varied experience specific to the specialty area of assignment, which applied the knowledge and abilities listed above.

Master's Degree in a related engineering/architectural field may be substituted for up to one year of the required experience at the rate of three college semester units for one month of experience.

License/Certification

Possession of a valid license as a Professional Engineer (PE)/Professional Geologist (PG) in an engineering area related to the area of specialty assignment issued by the California Board for Professional Engineers, Land Surveyors, and Geologists. Some assignments may require the following depending upon assignment, include but are not limited to civil, electrical, mechanical, chemical, geological, sanitary or environmental engineering specialties.

Or

Licensing as an Architect by the California Architects Board.

Possession of a valid California Driver's license, Class C or higher, may be required by date of appointment.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

Airport Access Requirements:

Employees must clear background check, which includes a Criminal History Records Check (CHRC), Transportation Security Administration (TSA) check and Security Threat Assessment (STA) check. Possession of, or ability to obtain, a valid Airport Access Badge with an Airport Driving Endorsement within ten (10) days of employment. Airport Access Badge with Airport Driving Endorsement must be maintained.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Ability to work in a typical office setting, and to use standard office equipment, including using hands, arms and shoulders repetitively to operate a keyboard and to write; work may require body mobility, strength and stamina to infrequently perform physical activities such as inspecting various construction projects and facilities, walking on uneven terrain and traversing hills and/or construction sites; vision sufficient to read printed materials including blueprints and computer screens; hearing and speech sufficient to communicate clearly and effectively in person, to groups of people, over the phone and by radio. Some assignments may require infrequent walking, standing, climbing, bending, stooping and kneeling. Mobility to drive a motor vehicle in order to attend off-site meetings and visit work sites may be required for some assignments.

Environmental and Working Conditions

Work is typically performed in an office environment but may infrequently require work in an outdoor environment Work may require infrequently performing tasks in environments with loud noises, fumes, or foul odors. Work may also involve exposure to uneven terrain, hills, construction sites, and other variable or potentially challenging site conditions. Some assignments may require travel between work locations, including operating a motor vehicle to attend off-site meetings and inspect work sites.

SENIOR PROFESSIONAL ENGINEER/ARCHITECT

Bargaining Unit: SM Supervisory Management

Class Code: 1843SM

COUNTY OF ORANGE
Established Date: September 13, 2005
Revision Date: October 2, 2026

DEFINITION:

Under general direction plans, organizes and implements development, construction and maintenance projects at County facilities; supervises professional and non-professional engineering and architectural staff and consultants in designing and implementing complex construction projects; and performs other work as required.

The Engineer/Architect series includes the following:
Engineer/Architect Assistant (1841GE)
Professional Engineer/Architect (1842GE)
Senior Professional Engineer/Architect (1843SM)

CLASS CHARACTERISTICS:

This is the full supervisory level of the Professional Engineer/Architect series. Positions in this class are expected to supervise other engineering/architectural staff and/or provide direction to contract staff; independently perform complex or specialized assignments, provide project leadership to lower-level staff, train staff, and consult in the areas of specialty. Incumbents may independently initiate, prepare, review, and approve County designed plans as the responsible engineer/architect. Depending upon assignment, positions in this class require professional licensure in one of the following disciplines: Architecture, Civil, Electrical, Structural, Industrial, Mechanical, Geotechnical or other related engineering field. This classification differs from the Civil Engineering series in that it allows for the use of engineers licensed in a wide variety of specialties.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Plans, organizes, prepares, supervises, and reviews the design and preparation of technical reports and/or feasibility studies and plans, specifications and estimates in connection with the planning, design, and/or construction or maintenance of a wide variety of public works engineering projects involving airport facilities (e.g. terminal complex and associated infrastructure and support systems, etc.), airfields, landfills, buildings, roadways, bridges and drainage structures, sewer systems, water distribution, electrical systems, environmental monitoring and control systems, central utility plants, underground fueling, piping, and utility systems, etc.; utilizes available computer technology/applications/software for optimization of engineering designs.

2. Prepares requests for proposal, scopes of work, and contract specifications for design and construction services; participates in the selection of consultants and design firms, and negotiates contracts and

change orders; directs the preparation of project designs and project reports/studies; prepares independent cost estimates, project specifications, and project schedules.

3. Manages projects through planning, scheduling, and monitoring critical milestones to ensure projects are completed on time and within budget. Reviews progress payment requests submitted by contractors and consultants for contract compliance, and to ensure billing reflects work completed; approves invoices for payment.

4. Performs high-level professional engineering and/or design work in connection with cost analysis, progress reports and research or other specialized technical studies related to assignment specialty.

5. Coordinates the inspection of public works projects under construction and/or repair. This includes controlling quantity and quality of materials, laying out work, interpreting plans and specifications, preparing progress reports and supervising the work of inspectors performing some of the foregoing tasks. Prepares and submits change orders and modifies the contract to cover changes in design.

6. Performs project reviews and field construction inspections for the coordination and accomplishment of projects with other County agencies.

7. For lessee/tenant projects, reviews, evaluations and reports on proposals, project plans and specifications for conformance with applicable regulatory requirements; represents and acts as liaison for County departments and regulatory agencies.

8. Interviews, selects, trains and evaluates professional and technical employees, recommends promotions, demotions and disciplinary action. Supervises and monitors work of contract architects and engineering consultants.

9. Plans and organizes the preparation of geotechnical, environmental, and/or material testing reports and reviews and evaluates results in relation to the design/construction procedures/execution of the projects.

10. Reviews department specific public works facility designs for compliance with County, State and Federal standards/requirements.

11. Prepares and/or maintains design and construction standards/specifications, including project delivery manuals/procedures, which provide the general and technical requirements for the basis of design for and delivery of projects.

12. Maintains records of department facilities including plans and specifications, maintenance records, engineers' reports, soil and hydrology reports, pavement analysis reports; gathers data required for pre-design and design of airport facilities; prepares analysis and evaluations of facilities from records and site inspections.

13. Supervises and/or performs analysis and evaluation of current development and existing condition of department facilities; prepares feasibility, and engineering studies on operational and public areas such as service areas, traffic controls and transportation systems, security and safety systems, infrastructure and equipment, and other projects related to development and/or improvement of department facilities and services; develops recommended solutions and plans.

14. Conducts technical investigations required for the planning and programming of a wide variety of engineering projects; prepares detailed technical reports; and writes joint powers agreements to

implement cooperative projects with other agencies.

15. Prepares annual budget estimates related to the delivery of capital and non-capital projects, professional services and other items related to requirements for maintaining and developing airport facilities.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Depending on assignment, principles and practices of architecture, civil, structural, electrical, industrial or mechanical engineering, environmental, or in a related engineering field

- Principles of supervision, performance management, and training of direct and in-direct staff

- Project/construction management including scheduling, change management, cost control; engineering mathematics/economics, including facility life-cycle costs assessment

- Principles of construction delivery of horizontal and vertical type projects; complex contract development/management

- Procurement policies, procedures, and principles relating to contract administration and/or administration of Public Works' Projects/Architecture/Engineering, or other consultant contracts

- Software systems for engineering design analysis and computations, computer-aided design and drafting, project management tools/applications, Microsoft Office Suite and document control system

- Construction industry standards, materials, practices, and methods as it relates to architecture, civil, structural, electrical, industrial or mechanical engineering, environmental, or in a related engineering field

- Federal, State and local regulations/requirements relevant to work assignment, and an understanding how these regulations/requirements impact projects within scope of responsibility (e.g. regulatory clearance and compliance requirements (e.g. NEPA, CEQA, RWQCB, AQMD, etc.)

Ability to

- Plan, organize, direct and evaluate the work of engineers, architects, technical staff, and contract professionals on a variety of complex engineering or architectural projects

- Oversee/manage/administer complex design services and construction contracts, and utilizations of professional consultants. Ensure that consultants receive appropriate oversight and supervision and are held accountable

- Provide leadership and guidance to internal and contracted staff to achieve project and developmental goals that are aligned with overall business objectives

- Read, understand, and interpret design and construction plans, specifications, cost estimates, and schedules

- Be a technical resource on complex issues for lower-level staff
- Prepare or direct the preparation of a variety of complex plans and specifications, design standards, and technical engineering reports/studies of varying project types
- Recognize and anticipate problems of project scope, budget, schedule, plans and specifications and determine necessary changes to address issues
- Coherently analyzes and presents cases for and against given approaches for accomplishing business objectives and/or project needs based on available information and circumstances, while supporting such analysis with clear, concise, and accurate reasoning and justification
- Provide technical explanations and recommendations in terms readily understood by technical and non-technical audiences
- Negotiate and manage competitive bidding processes for complex contracts
- Perform or direct the preparation of difficult or complex technical engineering computations, engineering studies, reports, estimates, project definition documents, scopes of work, or construction documents
- Apply project management industry standards and practices in the areas of project planning, coordinating, budget management, scheduling, and monitoring
- Establish and maintain effective working relations with managers, co-workers, subordinates, contractors, representatives of other County and government agencies and business entities, and members of the Board of Supervisors
- Manage projects through all stages to ensure that milestones are met and projects are completed within budget and policy
- Effectively collaborate with multiple stakeholders to understand customer/stakeholders' needs, and solve complex issues
- Communicate persuasively in both written and oral forms to technical and non-technical audiences
- Make sound business decisions based on limited, complex, or contradicting information while considering relevant public service ethical principles
- Monitor team members and enforce safety guidelines to ensure safe work practices
- Effectively and efficiently carry out complex engineering and administrative assignments/tasks with minimal or limited supervision

Education and Experience

One year of responsible and varied experience, subsequent to Licensure, which applied the knowledges and abilities listed above.

License/Certification

Possession of a valid license in one of the following disciplines, Civil, Structural, Electrical, Industrial, Mechanical, Geotechnical, or related engineering field issued by California's Board for Professional Engineers, Land Surveyors, and Geologists.

Or

Licensing as an Architect by the California Architects Board.

And

Possession of a valid California Class C or higher Driver License by date of appointment.

Special Requirements

Completion of a background investigation to the satisfaction of the County may be required for some assignments.

Airport Access Requirements:
Employees must clear background check, which includes a Criminal History Records Check (CHRC), Transportation Security Administration (TSA) check and Security Threat Assessment (STA) check. Possession of, or ability to obtain, a valid Airport Access Badge with an Airport Driving Endorsement within ten (10) days of employment. Airport Access Badge with Airport Driving Endorsement must be maintained.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Ability to work in a typical office setting, and to use standard office equipment, including using hands, arms and shoulders repetitively to operate a keyboard and to write; work may require body mobility, strength and stamina to infrequently perform physical activities such as inspecting various construction projects and facilities, walking on uneven terrain and traversing hills and/or construction sites; vision sufficient to read printed materials including blueprints and computer screens; hearing and speech sufficient to communicate clearly and effectively in person, to groups of people, over the phone and by radio. Some assignments may require infrequent walking, standing, climbing, bending, stooping and kneeling. Mobility to drive a motor vehicle in order to attend off-site meetings and visit work sites may be required for some assignments.

Environmental and Working Conditions

Work is typically performed in an office environment but may infrequently require work in an outdoor environment Work may require infrequently performing tasks in environments with loud noises, fumes, or foul odors. Work may also involve exposure to uneven terrain, hills, construction sites, and other variable or potentially challenging site conditions. Some assignments may require travel between work locations, including operating a motor vehicle to attend off-site meetings and inspect work sites.

RETIREMENT SERVICES TECHNICIAN I

Bargaining Unit: GE General

Class Code: 0860GE

COUNTY OF ORANGE
Established Date: April 5, 1994
Revision Date: October 02, 2026

DEFINITION:

Under general supervision, to perform clerical and technical support functions for the Benefits Program of the Orange County's Employees Retirement Office System (OCERS); assisting members over the phone and in person with questions related to benefit plans, service credit purchases and other benefit options, requests for member documents, reviews new member enrollment documents, assist with online accounts or requests related to reciprocity, research refunds and purchase of service credit, and to do other work as required.

The Retirement Services Technician series includes the following:
Retirement Services Technician I (0860GE)
Retirement Services Technician II (0861GE)

CLASS CHARACTERISTICS:

Positions in this class perform clerical and technical duties in support of retirement benefit processing and member services. Incumbents are responsible for intake, document processing, record maintenance, and responding to routine member inquiries related to retirement benefits and account activity.

This class differs from the Retirement Services Technician II in that the latter performs more advanced technical duties, including retirement-related calculations, data reconciliation, and preparation of complete case files requiring independent analysis and judgment. As experience is gained, incumbents are expected to exercise an increasing degree of independence in the performance of assigned duties.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Prepares confirmation of retirement dates, types of retirements available and estimate of future retirement benefits; verifies and/or changes beneficiary information, assist members in creating online accounts, assist with requests related to reciprocity, and research pension benefits to support Retirement Services Specialists.

2. Provides courteous, professional, and timely customer service while responding to member inquiries and explaining routine retirement-related processes.

3. Receives, reviews and processes new member enrollment documents including membership enrollment affidavits, plan elections, beneficiary designations, and reciprocity documents; generates correspondence to provide members with account information, educational materials, and instruction packets; follows up promptly with members to clarify or gather missing information.

4. Receives, reviews and processes current member documents including tax withholding, direct deposit, power of attorney submissions; generates timely correspondence notifying members of changes to account, or if additional information requested.

5. Researches data for refunds as the result of tier changes, or members contribution rate changes, and data for purchase of service credit such as Extra Help, previous service, and military service.

6. Communicates with County Departments and outside agencies regarding members' status.

7. Responsible for all aspects of electronic fund transfer of retiree payroll.

8. Reviews and inputs changes to deductions, tax withholding, direct deposit, power of attorney submissions, address changes, and generates timely correspondence notifying members of changes to account to the retiree payroll computer system.

9. Performs general office duties such as preparing and processing letters and forms, filing, maintaining records, and compiling data for reports.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Modern office practices and procedures, including filing methods and systems and the operation of office equipment

- Principles of writing and grammar, including correct spelling and proper word usage, punctuation and sentence structure

Ability to

- Perform difficult technical work requiring independent judgment, accuracy and speed

- Understand, interpret and apply complex retirement procedures, regulations and directions in order to process or to verify the accuracy of information or documents

- Identify and extract information from a variety of sources; uses a high degree of discretion in determining the appropriate method and specific steps for processing work

- Prepare clear and comprehensive reports and keep difficult records

- Learn to operate and use a variety of electronic and automated office equipment and computer software programs, such as, pension administration system, document management system, phone system, disability system, artificial intelligence models, etc.

- Use a County-approved means of transportation to travel among County facilities may be required for some assignments.

Education and Experience

Three (3) years of experience in retirement plan administration, clerical accounting, customer service, or general office support work which demonstrates the ability to perform the knowledge and abilities listed in the Minimum Qualifications section.

Qualifying experience may include processing documents, maintaining records, assisting customers, data entry, or performing general administrative support duties in an office environment.

One (1) year of the required experience may be substituted by one of the following:

- Completion of 18 semester or 27 quarter units in office practices, business administration, accounting, or a closely related field from an accredited college.

- Completion of 360 hours of training from a recognized occupational training program in office practices, business education, or a closely related field.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Body mobility to stand, walk, stoop, kneel, squat, and to work with hands and arms above shoulder level to retrieve case files and mobility to sit for prolonged periods while in meetings with clients; manual dexterity to hand write information and to use keyboard to enter information into computer system and operate office equipment; strength to lift and carry case files up to 10 lbs. and to pull open and push closed file cabinet drawers; vision sufficient to read standard text and computer screen; hear and speak well enough to communicate with others in person and on the phone.

Environmental and Working Conditions

Work is performed primarily in a standard office environment with minimal exposure to hazardous conditions. The position requires use of computers, telephones, and other office equipment with some flexibility in work hours. The role involves mostly sedentary work at a desk, requiring sustained attention to detail and organization. This position requires the ability to reason logically, review data, and remain calm while responding appropriately to changing and difficult situations with staff, members, and other stakeholders.

RETIREMENT SERVICES TECHNICIAN II

Bargaining Unit: GE General

Class Code: 0861GE

COUNTY OF ORANGE
Established Date: October 02, 2026

DEFINITION:

Under general supervision, to perform advanced technical duties related to the Orange County Employees Retirement System (OCERS); to perform retirement-related calculations, data validation, and case preparation in support of benefit determinations; and to do other work as required.

The Retirement Services Technician series includes the following:
Retirement Services Technician I (0860GE)
Retirement Services Technician II (0861GE)

CLASS CHARACTERISTICS:

This class is the full working-level technical classification in the retirement series. Incumbents perform specialized technical duties involving retirement calculations, reconciliation of member data, and preparation of complete case files for Retirement Services Specialists.

This class differs from the Retirement Services Technician I in that incumbents perform more complex technical work requiring analysis, interpretation of data, and independent judgment in resolving discrepancies and preparing retirement cases. It differs from the Retirement Services Specialist in that incumbents do not interpret retirement laws and policies for purposes of advising members, do not conduct benefit counseling, and do not make final benefit determinations.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Performs service credit purchase (SCP) research and prepares calculations of basic to moderate complexity; reviews eligibility factors and supporting documentation for completeness.

2. Processes contribution corrections, adjustments, refunds, and reconciliations; researches discrepancies related to service credit, compensation, contribution history, and retirement tiers.

3. Gathers, reviews, and organizes member employment, payroll, and retirement data; prepares complete and structured case files to support Retirement Services Specialist.

4. Verifies and reconciles payroll records, service history, and reciprocity data; identifies inconsistencies and takes appropriate action to resolve routine issues.

5. Coordinates with County departments, employers, and external agencies to request, verify, and follow up on member data, including reciprocity-related information.

6. Maintains and updates member account records in automated systems; ensures accuracy, completeness, and consistency of retirement data.

7. Utilizes workflow systems to track case progress, monitor deadlines, and ensure timely processing of assignments.

8. Responds to member, department, and agency inquiries in a timely manner regarding procedures, processes, and case status; provides information of a procedural nature without advising on benefit options.

9. Assists Retirement Services Specialists by providing technical calculations, summaries, and supporting documentation; identifies and refers complex or unusual cases for further review.

10. Prepares a variety of records, reports, and correspondence related to technical processing and case preparation activities.

MINIMUM QUALIFICATIONS:

Knowledge of

- Retirement, benefit, accounting, or financial recordkeeping practices and procedures
- Methods and techniques of performing technical calculations and data reconciliation
- Modern office practices and procedures, including automated systems and database applications
- Methods of organizing, validating, and maintaining complex records and data
- Applicable rules, procedures, and regulations related to retirement systems (working knowledge)

Ability to

- Perform detailed technical work requiring independent judgment, accuracy, and attention to detail
- Analyze, reconcile, and validate data from multiple sources for accuracy, completeness, and compliance with established procedures
- Understand, interpret, and apply rules, procedures, and regulations to technical work
- Identify discrepancies and take appropriate action to resolve routine issues
- Organize and prepare complete and accurate case files and supporting documentation
- Communicate clearly and effectively both orally and in writing
- Work independently within established guidelines and timelines

- Establish and maintain effective working relationships with staff, departments, and external agencies

- Learn and effectively use automated systems, databases, and workflow tools such as pension administration system, document management system, phone system, disability system, artificial intelligence models, etc.

Education and Experience:

One (1) year of experience as a Retirement Services Technician I with OCERS or equivalent retirement processing role.

Or

Four (4) years of experience which demonstrates the application of the knowledge and abilities listed in the Minimum Qualifications section. At least one (1) year of this experience must be in a technical-level role involving retirement benefits, pension administration, accounting, payroll, or other governmental benefit programs.

Qualifying experience must include progressively responsible duties such as data validation, record reconciliation, calculation support, case preparation, or analysis of financial or benefits-related information.

College-level education or training directly related to retirement administration, business administration, accounting, finance, or a closely related field may be substituted for up to one (1) year of the required general experience at the rate of three (3) semester units or four (4) quarter units equaling one month of experience.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Body mobility to stand, walk, stoop, kneel, squat, and to work with hands and arms above shoulder level to retrieve case files and mobility to sit for prolonged periods; manual dexterity to hand write information and to use a keyboard to enter information into computer systems and operate office equipment; strength to lift and carry case files up to 10 lbs.; vision sufficient to read standard text and computer screens; hear and speak well enough to communicate with others in person and on the phone.

Environmental and Working Conditions

Work is performed primarily in a standard office environment with minimal exposure to hazardous conditions. The position requires use of computers, telephones, and other office equipment with some flexibility in work hours. The role involves mostly sedentary work at a desk, requiring sustained attention to detail and organization. This position requires the ability to reason logically, review data, and remain calm while responding appropriately to changing and difficult situations with staff, members, and other stakeholders.

RETIREMENT SERVICES SPECIALIST

Bargaining Unit: GE General

Class Code: 0862GE

COUNTY OF ORANGE
Established Date: April 5, 1994
Revision Date: October 02, 2026

DEFINITION:

Under general supervision, to perform technical duties related to the Orange County Employees Retirement System (OCERS); to interpret statutes, regulations, and policies for retirement members and beneficiaries on a variety of topics related to eligibility, benefit entitlements, withdrawals, and applications; calculates retirement benefit estimates verifying multiple factors, and to do other work as required.

The Retirement Services Specialist series includes the following:
Retirement Services Specialist (0862GE)
Senior Retirement Services Specialist (0863GE)

CLASS CHARACTERISTICS:

This is the entry level class in the Retirement Services Specialist series. Incumbents perform a variety of duties related to specialized knowledge of retirement benefits, state and federal regulations while learning OCERS policies and procedures and apply this knowledge in the counseling of members and beneficiaries, the computation of the various retirement benefits, and the administration of employer payroll reporting.

This class differs from the Retirement Services Technician II in that the latter performs technical calculations, data validation, and case preparation activities but does not make final benefit determinations or provide member counseling.

It differs from the Senior Retirement Services Specialist in that the latter is responsible for the most complex cases, advanced policy interpretation, and serves as a subject matter expert for escalated issues and system-wide impacts.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Acts as the primary professional customer service contact for members and employers via phone, email, text/chat, in-person meetings or group sessions or other means of communication as needed or assigned. Services may be provided on or off OCERS campus as employers may request.

2. Counsel members and/or beneficiaries on benefit options, service purchases, service retirement, death benefits, deferral of benefits, withdrawals and reciprocal provisions; assist members in completing member enrollment forms (beneficiary designation, electronic fund transfer, withholding certificates,

etc.), and ensures that available options are used in members best interests in light of system requirements.

3. Calculates and/or verifies retirement, disability, death and deferred benefits and refunds; maintains and verifies active and retired member retirement accounts including member status, employee contributions, rate schedules, interest rates and service factors; verifies eligibility and calculates contribution rate changes.

4. Calculates retirement benefit estimates verifying multiple factors, including service credits, purchase contracts, retirement tier(s) and reciprocity arrangements with other agencies; sources utilized include, among others, administrative guidelines, union agreements, mandated regulations, employment and payroll records, and County Employees' Retirement Act of 1937.

5. Coordinates reciprocal benefits with other retirement systems.

6. Coordinates with employers to assist with employer payroll reporting issues

7. Places qualified recipients on retirement payroll, removes recipients from the payroll following death or other disqualifications for benefit payments in an accurate and timely fashion to prevent underpayment or overpayment of member benefits.

8. Conducts group counseling sessions for active members to explain plan benefits and provide pre-retirement benefit information.

9. Receives and audits notification of retiree death from family members, attorneys, Social Security reports, and related sources; reviews estate related documents; confirms beneficiaries and determines paperwork necessary to process survivor benefits; coordinates completion of necessary documentation with appropriate party; processes benefits once all documentation is received.

10. Researches, evaluates, and resolves retirement benefit claims and inquiries for specific issues such as divorce and community property situations; identifies and reviews required documentation; calculates account splits and informs alternate payee options; prepares forms and correspondence, and processes paperwork.

11. Prepares a variety of information, records, reports and correspondence; process a variety of detailed and technical forms and files in accordance with a variety of benefit laws, rules and regulations.

MINIMUM QUALIFICATIONS:

Knowledge of

- Retirement, benefit, insurance or personnel practices and procedures

- Data Base management systems

- Communication techniques required for transmitting information including direct interviews, directing group discussions, preparation of oral and written reports

- Federal and State laws and regulations that impact the retirement system and retirement benefits

Ability to

- Understand, interpret and apply laws, statutes, rules and regulations pertaining to the retirement benefits system
- Communicate clearly and effectively at all organizational levels and in situations requiring tact and sensitivity
- Distinguish between the various levels and types of benefits provide by the plan
- Develop and maintain effective oral and written communications with a variety of agencies and individuals
- Plan and organize a multi-faceted workload; coordinate activities with appropriate staff and department sections
- Prepare and present written and oral information in a clear concise and accurate manner

Education and Experience

Four (4) years of experience which demonstrates the application of the knowledge and abilities listed in the Minimum Qualifications section. At least two (2) years of this experience must be in a technical-level position within a retirement, pension, insurance, or other governmental benefit program, or in a personnel system involving retirement benefit administration.

Qualifying experience must include progressively responsible duties such as retirement benefit processing, calculation and verification of benefits, case preparation, records analysis, or related technical support functions in a retirement or benefits environment.

College-level education or training directly related to retirement administration, public administration, business administration, accounting, finance, or a closely related field may be substituted for up to one (1) year of the required general experience at the rate of three (3) semester units or four (4) quarter units equaling one month of experience.

Additional college-level education beyond the bachelor's degree in a directly related field may be substituted for up to an additional one (1) year of required experience using the same substitution formula.
Certification as an Employee Benefits Specialist (CEBS) may be substituted for up to one (1) year of the required experience.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements
Body mobility to stand, walk, stoop, kneel, squat, and to work with hands and arms above shoulder level to retrieve case files and mobility to sit for prolonged periods while in meetings with clients; manual dexterity to hand write information and to use keyboard to enter information into computer system and operate office equipment; strength to lift and carry case files up to 10 lbs. and to pull open and push closed file cabinet drawers; vision sufficient to read standard text and computer screen; hear and speak well enough to communicate with others in person and on the phone.

Environmental and Working Conditions

Work is performed primarily in a standard office environment with minimal exposure to hazardous conditions. The position requires use of computers, telephones, and other office equipment with some flexibility in work hours. The role involves mostly sedentary work at a desk, requiring sustained attention to detail and organization. This position requires the ability to reason logically, review data, and remain calm while responding appropriately to changing and difficult situations with staff, members, and other stakeholders.

SENIOR RETIREMENT SERVICES SPECIALIST

Bargaining Unit: GE General

Class Code: 0863GE

COUNTY OF ORANGE
Established Date: April 5, 1994
Revision Date: October 02, 2026

DEFINITION:

Under minimal supervision, researches, resolves and processes the most complex and difficult benefit claims and inquiries for the Orange County Employees Retirement System (OCERS); acts in lead capacity providing technical support and training to Retirement Services Specialists; performs quality assurance activities and performs other work as required.

The Retirement Services Specialist series includes the following:
Retirement Services Specialist (0862GE)
Senior Retirement Services Specialist (0863GE)

CLASS CHARACTERISTICS:

This is professional level class in the Retirement Services Specialist series. Incumbents are required to have an in-depth knowledge of the legal, organizational and financial areas underlying employee benefit plans and are expected to work with limited supervision and a high degree of independence.

The Senior Retirement Services Specialist differs from the Retirement Services Specialist in that the incumbents are expected to resolve complex and difficult benefit claims and inquiries. This class is also distinguished from the Retirement Services Program Supervisor in that the latter is the full supervisory class with responsibilities of supervision and evaluation of assigned staff. This position may act as a team lead answering questions and providing guidance regarding the work performed by Retirement Services Specialists.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Interprets and explains to members and beneficiaries the County Employees Retirement Law of 1937 as well as other laws and regulations relating to retirement; interprets and explains alternate benefit programs, i.e., long-term employer-based disability, service-connected disability, deferred compensation and alternate contribution accounts.

2. Provides courteous, professional, and timely customer service while responding to member inquiries and explaining routine retirement-related processes.

3. Researches and evaluates retirement benefits in order to advise members and beneficiaries of their options.

4. Communicates with various groups and organizations regarding the retirement systems regulations and benefits; professionally represents the office with employee groups, actuaries, and local, state and federal agencies; provides outreach and technical guidance to employers.

5. Reviews and processes the most complex members and beneficiaries services, and deferred retirement benefits.

6. Research, evaluates, and resolves complex retirement benefit claims and inquires for divorce decrees including identify and review required documentation, calculation of account splits, and inform alternate payee of their options; prepare forms and correspondence and process paperwork.

7. Researches and responds to the more complex inquiries and claims either verbally or in writing; takes corrective action as required.

8. Assists in the production of the retiree's payroll and processing of withdrawals.

9. Assists in producing, analyzing, and verifying the accuracy of actuarial data systems reports.

10. Conducts complex audits of member accounts; verifies previous audits; resolves discrepancies to assure compliance with retirement laws and regulations; resolves complex employer payroll reporting issues.

11. Performs Quality Assurance activities including performing quality reviews, identifying trends and processing issues, implementing corrective actions, developing procedures, providing technical guidance, and recommending process improvements.

12. Collaborates with information technology staff on testing software updates to progress from testing environment to the actual environment.

13. Provide training to employees in their areas of work.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of

- Employee benefit principles and concepts
- Legal, organizational and financial information underlying employee benefit plans
- Retirement, benefit, insurance and personnel practices and procedures
- Federal and State laws and regulations that impact the retirement system and retirement benefits

Knowledge of

- Data Base management systems
- Communication techniques required for transmitting information including direct interviews, directing group discussions, preparation of oral and written reports
- Various public and private retirement and benefit systems

Ability to

- Understand, interpret and apply laws, statutes, rules and regulations pertaining to the retirement benefit system
- Communicate clearly and effectively at all organizational levels and in situations requiring tact and sensitivity
- Explain how and why the Orange County Retirement System is designed and managed
- Develop and maintain effective oral and written communications with a variety of agencies and individuals
- Plan and organize a multi-faceted workload; coordinate activities with appropriate staff and department sections
- Use a personal computer to chart and graph retirement data for use in various retirement communication programs and publications
- Perform actuarial data verification

Education and Experience

Two (2) years of experience as a Retirement Services Specialist with OCERS.

Or

Four (4) years of experience which demonstrates the application of the knowledge and abilities listed in the Minimum Qualifications section. At least three (3) years of this experience must be in a journey-level position performing retirement benefit determination, policy interpretation, and complex case analysis within a retirement, pension, or governmental benefit program.

Qualifying experience must include advanced responsibilities such as resolving complex or disputed cases, interpreting retirement laws and regulations, validating calculations, handling escalations, and providing technical guidance to staff.

College-level education or training directly related to retirement administration, public administration, business administration, accounting, finance, or a closely related field may be substituted for up to one (1) year of the required general experience at the rate of three (3) semester units or four (4) quarter units equaling one month of experience.

Additional college-level education beyond the bachelor's degree in a directly related field may be substituted for up to an additional one (1) year of required experience using the same substitution formula.

Certification as an Employee Benefits Specialist (CEBS) may be substituted for up to one (1) year of the required experience.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Body mobility to stand, walk, stoop, kneel, squat, and to work with hands and arms above shoulder level to retrieve case files and mobility to sit for prolonged periods while in meetings with clients; manual dexterity to hand write information and to use keyboard to enter information into computer system and operate office equipment; strength to lift and carry case files up to 10 lbs. and to pull open and push closed file cabinet drawers; vision sufficient to read standard text and computer screen; hear and speak well enough to communicate with others in person and on the phone.

Environmental and Working Conditions

Work is performed primarily in a standard office environment with minimal exposure to hazardous conditions. The position requires use of computers, telephones, and other office equipment with some flexibility in work hours. The role involves mostly sedentary work at a desk, requiring sustained attention to detail and organization. This position requires the ability to reason logically, review data, and remain calm while responding appropriately to changing and difficult situations with staff, members, and other stakeholders.

DISABILITY RETIREMENT INVESTIGATOR

Bargaining Unit: GE General

Class Code: 6570GE

COUNTY OF ORANGE
Established Date: December 17, 1985
Revision Date: October 02, 2026

DEFINITION:

Under general supervision, investigates claims of County and District employees for disability retirement from the Orange County Employees Retirement System (OCERS). Gathers evidence, interviews witnesses, and performs other work as required.

CLASS CHARACTERISTICS:

Incumbents in this class report to the Director of Disabilities while working closely with OCERS Disability Team and Legal Staff in preparing and processing OCERS disability retirement applications. Disability Retirement Investigators interview witnesses, review and analyze medical reports and employer documents, gather information, review records, and make recommendations based on evidence.

Incumbents are expected to work independently, possess strong analytical and communication skills; be attentive to details and work effectively with others.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Ascertains and implements appropriate methods of investigation for the gathering of evidence presented in support of applications for disability retirement filed by members of OCERS.

2. Receives, reviews, and processes application materials for disability retirement to make initial eligibility determinations based upon legal statutes; analyzes documentation to develop a course of investigative action; and counsels applicants throughout the disability application process.

3. Researches and reviews medical reports and personnel files of various agencies or other sources to obtain information relating to disability retirement claims.

4. Analyzes workers' compensation files, interviews applicants, co-workers, supervisors, Human Resource staff, and others as necessary to obtain a complete record on the circumstances surrounding applicants' claims for disability retirement.

5. Provides technical guidance to staff on interpretation of disability retirement policies, procedures, and practices; serves as liaison to General Counsel when Board of Retirement decisions are appealed; may

serve as a witness and be requested to appear at formal hearings.

6. Prepares detailed reports and submits recommendations regarding the granting or denial of service and non-service-connected disability retirements to the Director of Disabilities in a timely manner.

7. Recommends policy and procedure changes to management for the processing of disability applications; assists in implementing process improvements and/or redesign efforts to improve upon the overall effectiveness and efficiency of the function.

8. May be requested to appear before a hearing officer if cases go to appeal.

MINIMUM QUALIFICATIONS:

Knowledge of

- Methods and techniques of investigation including interviewing, gathering and analyzing medical evidence

- OCERS policies and procedures

Ability to

- Gather, assemble, analyze, and evaluate facts and evidence, draw logical conclusions, and make sound judgments

- Prepare clear, concise, comprehensive reports

- Interpret written and oral instructions and carry them out

- Communicate clearly and work effectively at all organizational levels and in situations requiring tact and sensitivity

- Provide courteous, professional, and timely customer service while responding to member inquiries and explaining routine retirement-related processes.

- Exercise due diligence and independent judgement within defined policies and procedures

- Interpret and apply disability retirement laws and apply them in procedural situations

- Use OCERS case management systems such as pension administration system, document management system, phone system, disability system, artificial intelligence models, etc. to enter data and complete workflows

Education and Experience

Three (3) years of investigative experience in an assignment that requires the investigation of workers compensation claims or investigating disability retirement applications for a public or private entity.

Graduation from an accredited college or university with a Bachelor's Degree in Business Administration, Finance, Economics, Accounting, or other closely related field, may be substituted for up to one (1) year of the

required experience at the rate of three (3) semester units equaling one (1) month experience and one (1) hour of training equaling one (1) hour of experience.

Graduation from an accredited college or university beyond a Bachelor's Degree in Business Administration, Finance, Economics, Accounting, or other closely related field, may be substituted for up to an additional one (1) year of the required experience at the rate of three (3) semester units equaling one (1) month of experience.

Special Requirements

Applicants must pass a background investigation to the satisfaction of the hiring authority.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Body mobility to stand, walk, stoop, kneel, squat, and to work with hands and arms above shoulder level to retrieve case files and mobility to sit for prolonged periods while in meetings; manual dexterity to hand write information and to use keyboard to enter information into computer system and operate office equipment; strength to lift and carry case files up to 10 lbs., and to pull open and push closed file cabinet drawers; mental stamina and interpersonal skills to professionally interact and carry out duties; vision sufficient to read standard text and computer screen; hear and speak well enough to communicate with others in person, in front of a group, and on the phone.

Environmental and Working Conditions

Work is performed primarily in a standard office environment with minimal exposure to hazardous conditions. The position requires use of computers, telephones, and other office equipment with some flexibility in work hours. The role involves mostly sedentary work at a desk, requiring sustained attention to detail and organization. This classification operates in an environment that includes elected officials, non-elected officials, government agencies, community interest groups and the general public in the development and coordination of OCERS affairs; travel may be required to attend professional conferences and meetings.

RETIREMENT SERVICES SUPERVISOR

Bargaining Unit: SM Supervisory Management

Class Code: 0864SM

COUNTY OF ORANGE
Established Date: April 5, 1994
Revision Date: October 02, 2026

DEFINITION:

Under general direction, supervises benefits and investigatory staff in member services, employer services, and quality assurance departments and coordinates the day to day operations in the Orange County Employees Retirement System (OCERS); and to do other work as required.

CLASS CHARACTERISTICS:

This is a supervisory level classification that oversees the clerical and technical work of benefits, investigatory staff and/or employer services staff.

The Retirement Services Program Supervisor differs from the Member Services Manager in that the latter recommends the policies and procedures.

EXAMPLES OF DUTIES:

Below is a descriptive list of the range of duties performed by employees in this classification. These examples are not intended to reflect all duties performed within the job and not all duties listed are necessarily performed by each individual.

1. Supervises, plans, organizes, assigns, trains, and reviews the work of staff performing various types of transactions, including processing benefits, counseling and investigatory functions.

2. Provides courteous, professional, and timely customer service while responding to member inquiries and explaining routine retirement-related processes.

3. May review and monitor retirement disability claims, determining when additional information by investigator and/or physician may be required, and assists County Counsel Attorneys with preparing cases for hearings.

4. Implements changes in the policies and procedures used to counsel members and/or beneficiaries on their benefit options due to changes in the laws and regulations and to improve services.

5. Oversees the production of various transaction types and processes for OCERS members and employers including but not limited to: Member Retirement payroll, SCP's, Disability, Reciprocity, Employer transmittal and processing of withdrawals.

6. Coordinates and communicates with reciprocal agencies, plan sponsors, departmental payroll, and human resources personnel to assure proper reporting and filing of various forms related to new

member enrollments, transmittal reporting, and reciprocal establishments.

7. Assists staff with complex issues related to member benefits; oversees and audits benefit calculations ensuring compliance with county, state and federal retirement policies, procedures, and laws.

8. Continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies and recommends opportunities for improvement; implements approved changes.

9. Communicates with various groups and organizations regarding the Retirement Systems regulations and benefits; represents the office in a professional manner with employee groups, actuaries, and local, State and federal agencies.

10. Monitors and analyzes the accuracy of the system's actuarial data reports in conjunction with data processing.

MINIMUM QUALIFICATIONS:

Knowledge of

- Principles of supervision including leadership, staff selection, training, scheduling, evaluation and discipline
- Communication techniques required for interacting with individuals and groups at various organizational levels
- Principles of grammar, spelling and punctuation
- Office procedures and maintenance of records, and theory, statistical analysis techniques and payroll procedures in conjunction with a data system

Ability to

- Speak and write clearly and concisely to convey technical and complex information
- Encourage the performance and development of subordinate staff
- Identify data relevant to problems and proactively analyze and recommend effective solutions
- Develop and maintain a positive and effective relationship with staff, membership and individuals

Education and Experience

Two (2) years of experience as a Senior Retirement Services Specialist with OCERS.

Or

Four (4) years technical level experience in a retirement, insurance, or government benefit program, or in a personnel system which involves retirement benefit experience.

And

One (1) year of supervisory experience or successful completion of an employer sponsored or other introductory course in the principles of supervision.

College level education or training directly related to such work may be substituted for up to one (1) year of the required experience at the rate of three semester units equaling one (1) month experience and one (1) hour of training equaling one hour of experience.

College level education beyond the bachelor degree which is directly related to the position may be substituted for up to an additional one (1) year of required experience at the rate of three semester units equaling one month of experience.

Certification as an Employee Benefits Specialist (CEBS) may be substituted for up to an additional one (1) year of the required experience.

PHYSICAL, MENTAL, ENVIRONMENTAL AND WORKING CONDITIONS

Physical and Mental Requirements

Body mobility to sit for prolonged periods of time while in meetings; manual dexterity to hand write information and to use keyboard to enter information into computer system; strength to lift and carry case files up to 10 lbs.; vision sufficient to read standard text and computer screen; hear and speak well enough to communicate with others in person and on the phone.

Environmental and Working Conditions

Work is performed primarily in a standard office environment with minimal exposure to hazardous conditions. The position requires use of computers, telephones, and other office equipment with some flexibility in work hours. The role involves mostly sedentary work at a desk, requiring sustained attention to detail and organization. This position requires the ability to reason logically, review data, and remain calm while responding appropriately to changing and difficult situations with staff, members, and other stakeholders.

Our Community. Our Commitment.

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Visit the County website at www.ocgov.com for more information about County programs and Board meeting dates and agendas.

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