



**State of Oregon  
Public Employees Retirement System  
Position Description**

**Position Information**

**Employee Name:** Vacant

**Position No:** 0980602

**Class Title:** Retirement Counselor 2

**Class No:** C0842

**Working Title:** Presenter

**Agency No:** 45900

**Section Title:** Retirement Education  
(RE)

**Budget Auth. No:** 001022790

**Rep. Code:** OA

**Established Date:** 7/1/2007

**Work Location:** Headquarters - Tigard  
OR

**PD Revised Date:** 5/31/2016

**Position:** Permanent / Full time

**FLSA Classification:** Non-Exempt

**Eligible for Overtime:** Yes

**PERS Mission Statement**

**We serve the people of Oregon by administering public employee benefit trusts to pay the right person, the right benefit, at the right time.**

**Program Information**

**Describe the program in which this position exists.**

**Operations Division**

The Operations Division is responsible for providing accurate information and timely customer services to PERS members, including comprehensive retirement plan information and assistance, issue resolution; providing accurate information and timely services to PERS employers including employer education, reporting assistance, compliance, overdue data, and contribution collection and validation; intake and processing of all benefit applications and stand-alone forms before and after retirement; initiating benefit estimates and processing purchases; determining eligibility for withdrawal; approving and denying disability applications; determining beneficiaries for pre- and post-retirement death benefits; reviewing court orders for compliance; calculating, maintaining, and ending all service retirement, disability, divorce, and death benefits for the PERS, OPSRP and IAP retirement programs.

0 %

**Position Purpose**

## Describe the primary purpose of this position.

### RC2 Presenter

Serve as a Retirement Counselor responsible for conducting group presentations and Individual Retirement Application Assistance sessions.

0 %

## Core Competencies

### Title and Definition

### Weight

#### Teamwork and Collaboration

25 %

Is an effective team player who adds complementary skills and contributes valuable ideas, opinions, and feedback to the team.

#### Simplicity

25 %

Reducing barriers through clear communication and streamlined processes.

#### Innovation

25 %

Empowering change through collaborative teamwork.

#### Integrity

25 %

Inspiring trust through transparency and accountability.

## Description of Duties

### Title and Definition

### % of Time

#### E - Conduct Individual Retirement Application Assistance Sessions

- Assist members by explaining benefit estimates, retirement options, calculation methods or account specific questions or issues.
- Assist members by explaining appropriate forms and supporting documents.
- Provide comprehensive review of application(s), forms, and supporting documents for accuracy and completeness.
- Explain the retirement application process.
- Notarize forms.

45 %

#### E - Laws, Rules, Presentations

- Maintain expertise on laws, rules, regulations, and policies for all three of the above mentions retirement plans by maintaining a full knowledge of ORS 238 and ORS 238A. Performs as a frequent liaison with the PPCD staff to clarify, update, and insure compliance with ORS 238/238A.
- Obtain feedback from participants of retirement workshops for both group counseling and web-based workshops to maintain quality of presentations we are providing. Provides evaluations to the Presentation Team Coordinator.
- Provide PERS portion of the retirement workshops provided by the financial information services provider (Currently VALIC).
- Make arrangements for travel to and from presentations to include making

25 %

hotel reservations in advance at government rates.

- Maintain accurate presentation statistics to include number of participants, miles traveled to location, and number of hours required for total travel and presentation.
- Track travel expenses and submit travel expense detail forms for reimbursement.
- Maintain knowledge of State of Oregon per diem and mileage rates and familiarity with the Oregon Accounting Manual provided by the State Controller's Division.

**E - Provide Group Presentations to Active, Inactive, Disabled, Retired Members, Employers, Beneficiaries, and Non-Members.**

- Explain complex and technical retirement information regarding all aspects of the PERS, IAP, and OPSRP pension plans.
- Communicate how PERS benefits are calculated to include factors and calculation methods, different options for receiving PERS benefits, and how to read PERS estimate of benefits.
- Explains how to use the web-based calculator to create an estimate of benefits and where to find information on the PERS website.
- Thoroughly explain retirement processes to include eligibility to retire, special purchases, PERS resources, including PERS Health Insurance Program, how to obtain PERS retirement forms, and special forms required for education and police and fire members.
- Thoroughly explain complex and technical retirement information regarding the Individual Account Program including how to access IAP account via internet and information available, the process for obtaining IAP benefits, IAP payout options, and how to fill out IAP program retirement forms.
- Thoroughly explain complex and technical retirement information regarding the Oregon Public Service Retirement Plan (OPSRP) including eligibility requirements, how benefits are calculated, and options available for taking retirement benefits under this program.
- Use all modes of communications to provide PERS/OPSRP/IAP presentations to include: Group Counseling in person, I-link web-based training, video-conferences, and in frequent cases (hearing impaired) one-on-one counseling.
- Drive to and conduct group or individual presentations in various areas in the State of Oregon.

25 %

**N/E - Other duties as assigned.**

- Responding to member email/correspondence and providing back up phone support.

5 %

**Physical Requirements - Working Conditions**

**Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions.**

Standard office equipment/supplies. Regular and timely attendance is an essential function required to meet the demands of this job and to provide necessary services.

**RC2 Presenter**

Typical office environment (air-conditioned, non-smoking office) or presentation

facility. Requires extensive and frequent travel throughout the State of Oregon. Requires occasional overnight travel. Ability to multi-task and be able to explain complex Retirement processes and concepts in a simplified manner to members and the public and function in a multidisciplinary environment. A valid driver's license or acceptable alternative transportation is required.

0 %

## Guidelines

**List any established guidelines used in the position, such as state or federal laws or regulations, policies, manuals or desk procedures.**

Agency Policies and Procedures  
 Business Rules and Policy Papers  
 Desk Procedures  
 EDX Manual  
 Employer Manual  
 Internal Revenue Code (IRC)  
 IT Best Practices (I.E. "RUP" and other standards)  
 On-line Member Handbook  
 Oregon Accounting Manual (OAM)  
 Oregon Administrative Rules (OAR)  
 Oregon Revised Statutes (ORS)  
 PERS brochures and publications  
 PERS Health Insurance Guide  
 PERS Style Guide  
 Service Retirement Application/Pre-retirement Guide  
 State of Oregon Policies and Procedures  
 System of Record Operating Manuals (jClarety)  
 Web sites (PERS, State of Oregon, Employer, Member, etc.)

How are these guidelines used to perform the job?

All the above-listed references are used to ensure entitlement to benefits, to make determinations and to assure uniformity in the information given.

## Work Contacts

**With whom, outside of co-workers in this work unit, must this position regularly come in contact?**

Who	How	Purpose	How Often
PERS Employers, Members and Public	phone, personal correspondence	provide and receive information, provide guidance, interpretation and application of applicable federal	daily

		and state laws and statutes	
Service Division, manager and staff	phone, personal, correspondence	guidance, project/program planning and recommended courses of action	as needed

**Position Related Decision Making**

**Describe the typical decisions of this position. Explain the direct effect of these decisions.**

**RC2 Presenter**

Continuous decision-making occurs when interacting with PERS staff, members and the public regarding eligibility for specific PERS retirement plans and benefits under federal and state laws, statutes, and regulations. A wrong decision would seriously affect the lifetime retirement income of a member or the death benefit payable to a beneficiary. 0 %

**Review of Work**

**Who reviews the work of the position?**

Mgr Classification	How	How Often	Purpose
X7006	guidance, project/program planning and recommended courses of action	monthly or as needed	performance and quality assurance

**Additional Position-Related Information**

**ADDITIONAL REQUIREMENTS:** List any knowledge and skills needed at time of hire that are not already required in the classification specification:

**SPECIAL REQUIREMENTS:** List any special mandatory recruiting requirements for this position: Employees will be subject to a computerized criminal history background investigation. Adverse background data may be grounds for immediate disqualification.

Required to possess a valid drivers license.

**BUDGET AUTHORITY:** If this position has authority to commit agency operating money, indicate the following:

## Physical Demands - General Activities

(N)ot Required - 0%  
(I)ntermittent - 1 - 5%  
(O)ccasional - 6 - 33%  
(F)requently - 34 - 66%  
(C)ontinuous - 67 - 100%

Lifting <10 lbs  
Lifting >11-25 lbs  
Lifting >26-50 lbs  
Lifting >50 lbs

	% of Time	Notes
<b>Sitting</b>	C	8/5 Desk/Office
<b>Standing</b>	F	
<b>Walking</b>	O	
<b>Climbing/Balancing</b>	N	
<b>Reaching - with arms and hands</b>	I	
<b>Stooping/Kneeling/Crouching/Crawling</b>	N	
<b>Talking</b>	F	
<b>Hearing</b>	C	
<b>Lifting</b>	I	>26-50 lbs. files/equipment
<b>Vision - close, peripheral, depth, ability to adjust focus</b>	C	

## Organizational Chart

To view a copy of a current organizational chart, click [here](#).

## Employee Statement of Understanding

I have read and understand the position description for my position. I am able to perform all of the essential functions of this position.

I agree to comply with the agency's compliance policies and all laws, rules, regulations and standards of conduct relating to my position. As an employee, I understand my duty to report any suspected violations of the law or the standards of conduct to my immediate supervisor.

As an employee, I will strive to uphold the mission and vision of the organization. All employees are required to adhere to the values in all their interactions with citizens and fellow employees.