

## **POLICE AND FIRE PENSION FUND**

One West Adams Street, Suite 100  
Jacksonville, Florida 32202-3616

Phone Number (904) 255-7373  
Fax Number (904) 353-8837



### **MEMORANDUM**

**TO:** Board of Trustees Personnel Committee  
**FROM:** Timothy H. Johnson, Executive Director  
**SUBJECT:** Personnel Committee Agenda  
**DATE:** June 27, 2019

---

We discussed early this spring promoting the Assistant Plan Administrator, Steve Lundy, to the position of Deputy Director.

In the way of background, Steve joined the PFPF in February 2014 as a benefits specialist and analyst. He served in that capacity until February 2017 when I reorganized staff. Recognizing Steve's extraordinary command of benefit rules and technical skills, I changed his title to Assistant Plan Administrator to more appropriately describe his role, but with no change in pay. Steve has been fairly compensated the past five years averaging about 6% annually under the PFPF Step Plan and with COJ raises. But none of that was performance-based until now, under the New PFPF Pay Plan.

Steve has distinguished himself as Assistant Plan Administrator over the past three years. In fact, he does more than the position requires. In the past nine months, Steve has contributed to the administration of the DROP & COLA elections stemming from the 2017 reform, bailiffs' time service connections, Beaches time service connections, Share Plan issues, and most recently, the JFRD out of class pay issues. Steve has demonstrated capacity to take on additional responsibility without sacrificing performance.

Here are the two primary enhancements to the current position, which justify this action.

- Pension data systems development and testing;
- IT analyses, reporting and special projects related to benefits administration and corrections.

Additionally, the responsibilities of supervising the recently hired part-time receptionist falls under Steve's duties.

A copy of the Deputy Director Job description (approved by COJ Employee Services) is attached.

As challenges continue with benefit bargaining, upgrading to a new ERP system along with corrections and appeals, it is critical that the PFPF become more responsive and adaptable to technical changes regardless of the source. Consequently, small changes in the administration of the Plan take an unnecessarily long amount of time to implement to completion. Unprepared, future Plan changes could become overwhelming to staff and erode member/stakeholder confidence in the accuracy of records and calculations.

The Assistant Plan Administrator position would be eliminated. The new Deputy Director position would replace it. This is a different Deputy Director position than was eliminated in 2017. This position is near par with the two other PFPF management positions. (See below).

PFPF Manager Pay Code Comparisons				
Job Description	Assistant Plan Administrator	Deputy Director	Pension Benefits Manager	Finance Manager
Pay Code	29.14	29.16	29.18	29.19

Steve Lundy would be promoted from code 29.14 to 29.16.

The Deputy Director position currently pays up to \$8,613 per month depending on experience. This personnel action recommends a 3% increase in Steve's current salary bringing him to \$6,022 per month. The change would take effect with the first pay period after Board approval.

I encourage the committee to approve this new position, promotion and raise; making recommendation to the full Board of Trustees on July 19, 2019. It is well-deserved by Steve and good for the Plan.

## **POLICE & FIRE PENSION DEPUTY DIRECTOR**

**General Administration  
Accounting & Financial Services  
Manager  
Sort Code: A04485**

**Occ Code: 04803  
Exempt Status  
Pay Grade: 29.16**

The Deputy Director reports to the Executive Director/Plan Administrator of the Police & Fire Pension Fund (PFPF) or designee and is responsible for the administrative, supervisory and analysis work relating to the day-to-day operations. Primary responsibilities include the following:

- Coordinates board and committee functions; such as setting up and advertising regular and special meetings, preparing board agendas and backup materials, attends meetings to record minutes.
- Coordinates elections for members of the board who are elected by plan participants and provides information/educational materials to new members.
- Coordinates the monthly staff meeting and other related meetings to facilitate communication regarding operational issues between all divisions.
- Writes procedures as directed for administration of plan provisions; updates and maintains Standard Procedures Manual and personnel policy manual.
- Prepares and presents educational workshops for plan participants including but not limited to vesting, DROP, and retirement.
- Prepares, edits, and distributes the Annual Report, Summary Plan Description, and the quarterly Police and Fire Pension Fund newsletter.
- Represents the Fund on speaking engagements.
- Responds to member inquiries and provides various consultations with members in conjunction with plan benefits.
- Department Ethics Officer & related responsibilities.
- Schedules, assigns, monitors, reviews, and evaluates the work of subordinates.
- Communicates clear direction, manages for results, and leads organizational change.
- Identifies problems and opportunities within the organization and ultimately provide solutions that help achieve the plan's goals.
- Collaborates with financial, benefits and IT teams to develop initiatives and strategies that optimize costs and improve internal and external reporting.
- Develops and monitors data quality metrics and ensure pension fund data and reporting needs are met.
- Conducts and prepares memoranda, spreadsheet, reports, internal audits, analyses, and undertakes special projects, presentations. (Retro benefit adjustments, data corrections, Share Plan issues).
- Is involved in systems development and in the various modifications to data systems, programs, and reports in conjunction with the Fund's data base (JaxPension upgrades, modifications, custom report capabilities, ERP migration & Testing (bridge), Constant Contact, Share Plan).
- Assists Executive Director in any other duties as assigned.

**Position Requirements:** Bachelors' Degree from an accredited institution in Business Administration, Management, Information Technology, Public Administration or related field with at least four years of pension fund administration experience. Strong technology, analytical and communication skills are must-have traits. Ability to handle multiple priorities simultaneously. Experience working with senior decision makers. Understanding of ordinance and regulatory requirements combined with understanding of key performance indicators. Master's degree is preferred.

**Approved:** 6/20/17

**Revised:** 6/6/19