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Member Benefit and Data Analyst  
Kansas City Public School Retirement System

A Member Benefit and Data Analyst is sought for the Kansas City Public School Retirement System. This position reports directly to the Executive Director. Responsibilities include the review of member refunds, support of member services, the analysis and review of contribution data and other administrative functions.

A successful candidate will have a bachelor's degree in a business-related field with experience in defined benefit plan administration and/or experience working with an employer associated with a defined benefit plan. Position requires a detail-oriented person, effective organization skills and excellent communication and human relation skills.

Resumes should be accompanied by a cover letter that includes a statement of experience working in or with a defined benefit plan and the importance of its mission to serve the community. It should also include a description of prior experience and salary expectations.

For additional information regarding this position, please visit [www.kcpsrs.org](http://www.kcpsrs.org). Send cover letter, resume and transcripts by March 21, 2025 to KCPSRS, 3100 Broadway, Suite 1211, Kansas City, MO, 64111 or email at [jason.steliga@kcpsrs.org](mailto:jason.steliga@kcpsrs.org).



## **Member Benefits and Data Analyst**

### **ABOUT THE POSITION**

The individual in this position reports directly to the executive director. Performs highly specialized pension system functions and activities in support of retirement member services and administrative functions, including refund requests, employer contribution data, responses to purchase of service requests and ensuring appropriate counts of active member death.

This position requires interacting with members in person, via email, telephone and ensuring the integrity of employer contribution data.

The person in this position continuously monitors and recommends modifications to standard operating procedures and files destined for permanent storage to improve efficiency and effectiveness of the Retirement System's operations. Expected to lend support to assist other staff members and provide backup, as required, to fulfill the KCPSRS mission. Performs related duties as required or assigned.

### **DUTIES & RESPONSIBILITIES**

#### **Reviews Member Refunds**

- Performs tasks associated with processing the refund of account balances ensuring refunds are completed in an accurate and timely manner.
- Researches and analyzes member data to provide employees with information regarding requirements of eligibility for refund of account balances.
- Ensures proper documentation is obtained and verified to process member withdrawal requests.
- Processes member withdrawals as direct payments, rollovers to IRA/Employer plan, or split between the two options.
- Identifies and contacts inactive members, verifies the termination date with the employer and sends out withdrawal application paperwork and, if member is vested, prepares, and sends out benefit estimates.
- Processes the taxes to the IRS and State of Missouri and transmit funds.
- Updates monthly withdrawal (refund) reports for Board of Trustee meetings.

#### **Supports Member Services**

- Research and resolve member issues.
- Appropriately answers active member inquiries via telephone calls and/or emails on a variety of matters concerning account information and KCPSRS policies, rules, and procedures.
- Composes correspondence citing applicable policies and/or statutes in response to member inquiries, as needed.
- Assists and provides technical support to members with login issues to the online Member Self Service Portal.
- Corrects member data errors when issues occur to ensure that accurate member data is recorded and maintained properly in the retirement database.
- Manages Death Process of members not retired



## **Member Benefits and Data Analyst**

- Develops and delivers presentations to stakeholders and team members on an ad hoc basis.
- Enters beneficiary forms as received into the pension administration and payroll system and uploads them to the electronic image repository database.
- Prepares paperwork and counsels members regarding refunds.

### **Purchase of Service**

- Assists with tasks associated with processing purchase of service completing requests in an accurate and timely manner.
- Assists with purchase payments and ensure adjustments are completed in the System's database to member service records.

### **Analyze and Review Contribution Data**

- Assists Benefit Data Analyst who receives and uploads employer contribution data.
- Maintains and enhances working relationships with KCPSRS covered-employers (District, Library, and charter schools) and outside agency personnel.
- Assists Benefit Data Analyst, as needed, in communications with covered employers' payroll departments or third-party contractors to ensure employer data files are submitted in a timely matter and contains accurate census data, contribution, and salary information for active members before recording information in the retirement database.
- Assists Benefit Data Analyst, as needed, in the reconciliation and resolves any differences on the contribution data received with the payments made by the employer.

### **Administrative Functions**

- Assists with information system user acceptance testing, as required.
- Participates in member statement review processes.
- May assist in the investigation, explanation, and clean-up of data triggered by discrepancies in the actuarial audit.
- Reviews data prior to IRS 1099 processing and cleans-up data as needed.
- Participates in reviews of the database system's PIRs making recommendations for the executive director.
- Assists with the System's technology assessments.

*This job description is neither all inclusive, nor restrictive. Management reserves the right to further define duties based on operational needs.*



## **Member Benefits and Data Analyst**

### **SUPERVISION RECEIVED/GIVEN**

Receives general supervision from the executive director. May provide guidance and assistance to full-time part-time and/or hourly employees, as required.

### **EDUCATION & EXPERIENCE / KNOWLEDGE, SKILLS & ABILITIES**

Bachelor's degree in business administration, finance, accounting, or related field, plus five years' experience in defined benefits and/or defined contribution administration, or insurance industry involving customer service, business and/or data analysis.

- Knowledge of or interest in issues affecting defined benefit plans.
- Knowledge of the functions of a pension system, its operating procedures, and regulations.
- Knowledge of federal, state, and local procedures, policies, regulations, and legislation impacting the maintenance of the member account records involved with the Retirement System.
- Some familiarity of actuarial theory and practices.
- A detail-oriented person.
- Proficiency in business English, grammar, spelling, and punctuation.
- Effective organizational skills.
- Exercise tact, judgment, and initiative.
- Discretion and confidentiality.
- Excellent communication skills (letter writing, emailing, and phone conversations) and ability to speak to large and/or small groups of diverse individuals educating them about pension plan.
- Proficiency in office technology, including but not limited to, Microsoft Word, Excel, PowerPoint, other software, and peripheral office equipment.
- Excellent human relations skills and ability to establish and maintain successful cooperative working relationships with KCPSRS staff, Board of Trustees, Members, as well as with stakeholders outside of the organization.
- Ability to work independently and in teams.
- Ability to prioritize work to meet deadlines.
- Ability to analyze, evaluate, and interpret data regarding salary, years of service, and purchase of service and draw sound conclusions.
- Ability to understand and perform mathematical equations and find solutions.
- Ability to respond appropriately and in a timely manner by following the correct process.
- Ability and willingness to function in a small office environment requiring conversant in the operations, rules, policies, and benefit's program of the Retirement System.