

**CITY OF LAKELAND
FLORIDA**



**INVITES YOUR INTEREST IN THE POSITION
OF**

**RETIREMENT SERVICES
DIRECTOR**

THE COMMUNITY

Lakeland is a premiere city, located in Polk County very near the exact geographic center of Florida. It is approximately 30 miles east of Tampa and 40 miles west of Orlando. Founded in 1885, Lakeland has a population of 91,600 and covers 75 square miles.

Recognized nationally by *Money Magazine* in 1998 as the “10th Best Place to Live in America” for medium-sized cities in the South, Lakeland offers its residents an exceptional quality of life. Beginning with Lakeland’s downtown district, which has been under a continuing program of redevelopment for several years, the City exudes beauty, charm, vitality, and a palpable sense of continual progress.

The beauty of historic Munn Park in the heart of downtown is complemented by a charming commercial district with numerous specialty shops, restaurants, and night-time entertainment opportunities. The Lake Mirror Promenade features magnificent columns and a seawall with classical ornamentation. Nearby Hollis Garden boasts a European design with more than 10,000 flowers and shrubs. The list of “beauty marks” could go on and on. The parks, lakes, street-scapes, and beautifully renovated businesses and government buildings make for a captivatingly beautiful downtown.

Culture and history abound throughout the city. Lakeland’s Florida Southern College features the world’s largest one-site collection of buildings designed by the legendary architect, Frank Lloyd Wright. The Imperial Symphony Orchestra provides the finest in instrumental music and concerts. The Lakeland Center is a top-rated entertainment, sporting, and convention complex. The historic Polk Theatre, a grand fully-restored 1927 theatre, is a venue for community-sponsored films and special events.

Lakeland’s special events are too numerous to mention, but they include the annual Orange Cup Regatta, a nationally acclaimed, limited hydro-plane boat race; auto racing at the USA International Speedway; and the Experimental Aircraft Association’s annual Sun ’n Fun Fly-in, an aerial extravaganza that has become America’s second largest aviation event of its type. Spring home to the Detroit Tigers, Lakeland also boasts the Lakeland Flying Tigers baseball team, Mayfaire-by-the-Lake Art festival, Lake Mirror Classic Auto Festival, the Polk Museum of Art, Explorations V Children’s Museum, the Pied Piper Play-

ers, Arts on the Park, the annual Florida Southern College Festival of Fine Arts, and the Florida Dance Theatre.



Lakeland’s municipal golf course and 32 public tennis courts are complemented by numerous public and private golf courses and tennis courts. Sixty well maintained municipal parks dot the City and, together with the City’s 38 named lakes, provide a multitude of opportunities for active and passive recreation. These include two pools, two top-quality weight rooms, eight racquetball courts, bike trails, and many water activities.

Lakeland abounds with educational opportunities. In addition to Florida Southern College, Lakeland is home to several other colleges, including Southeastern University and branch campuses of Polk Community College and the University of South Florida (USF). USF will also be constructing a new campus in northwest Lakeland. Lakeland takes pride in the superior performance of its public school students. It also has several excellent private k-12 educational institutions.

Anchored by facilities such as Watson Clinic, The Center for Cancer Care and Research, Lakeland Regional Medical Center, and Lakeland Regional Cancer Center, Lakeland is positioning itself to be a “Mecca” of healthcare.

Shopping opportunities are abundant, from numerous small specialty shops, the one-million plus square foot Lakeland Square Mall, and the

new Lakeside Village, a 650,000 square foot up-scale mixed-use development consisting of office, retail, and residential. Dining opportunities abound in downtown and throughout the City.

Interstate 4 passes through the northern part of the City and the Polk Parkway traverses the southern half of Lakeland. Together with Lakeland Linder Regional Airport, its high quality of life, its proximity to Tampa and Orlando, and its business-friendly recruitment policies, Lakeland has enjoyed considerable success with business development, and that success is on-going. Major companies with corporate headquarters in Lakeland include Publix Supermarkets and Sadle Creek Corporation.



CITY GOVERNMENT

Under its charter, the City is managed with a Commission-Manager form of government that has been in place since the mid 1920s. The legislative body consists of a Mayor and six Commission Members. With a staff of 2,200 full-time and 530 part-time employees, the City of Lakeland is a full-service city. Additional information on the City organization can be found at www.lakelandgov.net.

RETIREMENT SERVICES

Historically, Retirement Services had operated as a component of the Civil Service Board. Recently, the City has engaged in a restructuring initiative, part of which entails separating Retirement Services from the Civil Service framework.

The Director is responsible for planning, directing, and coordination of the Lakeland Retirement System which consists of the City Employees Pension Plan, the Firefighters' Supplemental Pension Plan, the Police Officers' Supplemental Pension Plan, the 401(a) Defined Contribution

Plan, the 457 Deferred Compensation Plan, the FICA Substitution Plan, and the Health Reimbursement Plan.

The Director reports to and serves as Secretary to the Retirement Board, the Firefighters' Supplemental Pension Board, and the Police Officers' Supplemental Pension Board. The Employment & Compensation Committee, comprised of representation from the three Retirement Boards, the City Manager, and the Finance Director, is charged with the responsibility of selection and evaluation of the Director, with recommendations to the full board.

Duties are performed in conformance with pension and retirement laws, City Charter provisions, and municipal administrative policies including detailed financial and participant reporting to the three Retirement Boards, the City of Lakeland, and the State of Florida. The incumbent is expected to exercise considerable independent judgment in developing and administration of a multi-faceted public retirement system. The Director interacts on a continuing basis with employees, Department Directors, and City Management in a consultative capacity.

Following are major functions of the position.

- Plans, organizes, and directs all functions of the Lakeland Retirement System.
- Implements directives and policies of the Boards of Trustees.
- Interprets the pension related statutes, rules and policies. Specific emphasis on Florida Statutes Chapters 112, 175, and 185 and federal pension laws and regulations.
- Directs the preparation of all state mandated reports, actuarial evaluations, and audits of the various pension plans.
- Develops Requests for Proposals for the procurement of Investment Managers, Financial Services, Custodial Services, Actuarial Services, and other services in support of the multifaceted Retirement System.
- Works in coordination with the Operations and Budget Committee to develop recommended policies implementing the specific provisions of the City pension plans and in the preparation and administration of the agency budget.
- Reviews budget to ensure accountability of expenditures and conformance to bench-

marks established by the Lakeland Retirement System Board of Trustees.

- Works with legal counsel to provide input in the drafting of ordinances to effect necessary changes to plans and, when required, directs the preparation of actuarial impact statements and submission to the appropriate State of Florida agencies.
- Reviews investment reports and investment management ADVs, monitors security trading activity, conducts due diligence reviews of investment related service providers, and reports to the responsible pension board as necessary.
- Develops and supervises financial planning, retirement planning, and health care savings employee education programs.
- Plans and reviews the work of a staff of professional employees.

The Director has a staff of three. The sum of the various retirement funds is about \$500 million.

THE IDEAL CANDIDATE

Education ♦ Degree in business administration, public administration or finance with considerable course work in finance. Masters degree in similar or related field preferred.

Work Experience ♦ Six (6) years experience in progressively responsible pension plan administration and pension fund management.

Desired Attributes

- Thorough knowledge of state laws governing retirement plans and supplemental plans
- Understands the basic principles underlying the investment and management of funds
- Excellent communication skills
- Excellent organizational and monitoring skills
- Excellent analytical skills
- High level of professional and personal integrity
- Well-honed sense of fairness and high level of objectivity in dealing with competing interests

- Can work effectively with multiple boards
- Ability to develop trust among various constituents
- Friendly, out-going, and approachable
- Willingness to provide accurate and “even” advice to the various boards
- Open and forthright in presenting information and opinions
- Able to translate complex information into layman’s terms
- Innovative and able to work within an evolving system
- Genuinely cares about the well-being of employees

COMPENSATION

The starting salary range for the position is \$80,000 to \$100,000, depending on qualifications. Fringe benefits are generous.

HOW TO APPLY

Cover letter, resume, and salary history by December 13, 2006 to: Tom D. Freijo, Ph.D., Senior Vice President, The Mercer Group, Inc., Freijo@Mercerfl.com P.O. Box 9328, Winter Haven, Florida 33883. TEL: (863) 299-3571 FAX: (863) 299-6737. The City of Lakeland is an Equal Opportunity Employer. Preference in initial employment shall be given to eligible veterans and spouses of veterans.

Applicants should be aware that applications in Florida become a matter of public record upon receipt.

