

## CITY OF SAN JOSE, CA

### OFFICE OF RETIREMENT SERVICES CHIEF EXECUTIVE OFFICER – IDEAL CANDIDATE

The ideal candidate will be a visionary, energetic and proven leader with public pension expertise. It is desired that this candidate be a long-term CEO of ORS. The ideal candidate will be able to usher change in a nurturing and supportive way, communicate to stakeholders in a trustworthy and calm manner and be hands on and supportive with employees.

The selected candidate will be detailed-oriented, operationally-driven and able to manage the organization with commitment and integrity. They will be confident when making a difficult decision and able to navigate and address political pressures or conflicts in a neutral way while best protecting the needs of ORS.

The ideal candidate will have effective presentation skills and a high level of diplomacy. They should be capable of keeping the Boards informed of material communication issues and developments; keeping staff, the Boards, and the City apprised of relevant developments of the plans; acting as a liaison between the Boards and the plan sponsor organization. The selected candidate will be active externally outside of San José to understand best practices and developments regarding public pension plans; and assisting the City Council in recruiting, selecting, and retaining independent board members, specifically those with deep knowledge of pension fund financial workings.

The ideal candidate will be well-rounded and familiar with the specific annual budgeting process city governments follow. They will have high level of investment knowledge that will complement ORS' Chief Investment Officer's leadership. Lastly, the CEO of ORS will thrive in taking a hard-working department and reshape it for the future as part of their legacy.

As ORS enters a new era, key areas of focus for the incoming CEO of ORS will be:

- **Leadership** – Be an engaged and on-site presence. Foster a positive and responsive professional environment. Inspire the workforce and lead a fresh re-branding effort that best represents ORS and its future goals.
- **Collaboration** – Work besides the Chief Investment Officer, be the key liaison between both Boards, the Mayor and City Council, the City Manager's Executive Team, the unions, legal counsel and other stakeholders.
- **Organization Review** – Evaluate each division within ORS to determine operational efficiency. Implement additional best practices as needed to ensure optimal performance.

- ***Personnel Management*** – Have an open-door policy and be accessible to staff at all levels. Be inclusive and interactive with the diverse staff.
- ***Customer Service*** – Review current customer service operations and be proactive in implementing new processes to improve the customer accessibility and experience with ORS.
- ***Information Technology*** – A new platform was implemented two years ago. Build on the new technology momentum and continue to build out the system to revise member portals, improve communication features and further automation of antiquated processes.