

PERSONAL SERVICES CONTRACT

This Personal Services Contract is made between the Oklahoma City Employee Retirement System, hereinafter known as "ERS" and Angel Odom, hereinafter known as "ODOM".

In consideration of the mutual covenants and agreements set forth herein, the ERS hereby retains ODOM as the Deferred Compensation Specialist of the ERS, and ODOM agrees to serve as Deferred Compensation Specialist of the ERS upon the following terms and conditions:

1. **EMPLOYMENT AT WILL.** ODOM's employment with ERS is that of an employee at will.
2. **TERM.** The term of this Agreement shall commence on May 10, 2024 and continue until either party serves upon the other, written notice of a desire to terminate the Contract per section 11 below.
3. **COMPENSATION.** ERS agrees to compensate ODOM for administrative services performed as the Deferred Compensation Specialist based on the ERS Pay Plan that may be adjusted periodically by the Board of the ERS. ODOM's initial annual salary of \$75,042.72 per annum (Range 804 and Step 1). Thereafter it shall be at a rate set annually by the Board of the ERS. ODOMS's annual salary shall be divided into an hourly rate and she shall be paid in the same manner as City employees are compensated per the 2023-2024 ERS Pay Plan attached as Exhibit "A".
4. **WORKERS' COMPENSATION.** The ERS will provide ODOM with workers' compensation coverage through the State Insurance Fund.
5. **SCOPE OF SERVICE.** ODOM assumes responsibility for the coordination of activities associated with the administration of the City's retirement and deferred compensation plans. Further, ODOM will provide clerical and administrative support to the Retirement System Manager, as outlined in the job summary attached hereto as Exhibit "B". ODOM will also be responsible for any additional assignments as may be required by the Board of the ERS or the Retirement System Manager.

6. **BENEFITS PLAN.** The ERS agrees to provide to ODOM a Benefits Plan comparable to the Benefits Plan provided by The City of Oklahoma City to its management employees as set forth in Article 700 of the Oklahoma City's Personnel Policies, adopted on July 18, 2017, or as may be amended. Said Benefits shall be provided at ERS's expense during the term of this Contract. ODOM will be required to make premium contributions toward benefits in an amount equal to that required of management regular full-time employees of The City.
7. **RETIREMENT PLAN.** The ERS agrees to afford ODOM the opportunity to participate as a member of the ERS, per Oklahoma City Municipal Code § 40-51 of the Oklahoma City Municipal Code, 2020 as amended. ODOM and the ERS will contribute to the system in the same manner as The City of Oklahoma City and its employees contribute to the system.
8. **LEAVE BENEFITS.** ODOM shall accrue sick leave and vacation leave in accordance with Article 700 of the City of Oklahoma City Personnel Policies, adopted on July 18, 2017, or as may be amended. Those policies may be amended from time to time. ODOM will be granted and provided a bank of 40 hours of vacation and a bank of 40 hours of sick leave upon her employment with the ERS.
9. **PERFORMANCE REVIEW.** ODOM's job performance will be evaluated annually by the Retirement System Manager and the Chairman of the Board of Trustees. ODOM, at the Board's discretion, may be subject to evaluation by the Trustees from time to time.
10. **NO EXTRA WORK CLAUSE.** No claim for extra work or services of any kind or character shall be recognized by or be binding on the ERS unless the work or service is first approved in writing by the Retirement System Manager or by the Chairman of the Board of Trustees.

11. **TERMINATION.** ERS by and through the Retirement System Manager or the Chairman of the Board, may terminate this contract, with or without cause, upon thirty (30) days written notice to ODOM. ODOM may terminate this contract, with or without cause, upon written notice to the ERS of not less than thirty (30) days prior to date of termination/resignation. Except for termination by ERS based upon Section 1203 of Article 1200 of the Oklahoma City's Personnel Policies, adopted on July 18, 2017, or as may be amended, it is expected that each party will provide said written notice not less than thirty (30) days prior to date of termination. Termination's based on the reason's set forth in Section 1203 of the Oklahoma City's Personnel Policies, adopted on July 18, 2017, or as may be amended, maybe immediate as determined by the Retirement System Manager in consultation with the Chairman of the Board of Trustees and the Municipal Counselor's Office.

Such notice shall be deemed to have been received when delivered to:

EMPLOYEE:

Angel Odom
420 West Main
Oklahoma City, Oklahoma 73102

EMPLOYEE RETIREMENT SYSTEM:

Employee Retirement System c/o
City Clerk
200 North Walker
Oklahoma City, Oklahoma 73102

12. **OBLIGATIONS UPON TERMINATION OF EMPLOYMENT.** Upon termination hereof, the ERS will compensate ODOM for work performed and documented up to date of termination and ODOM will submit all documents in her possession pertaining to the services rendered hereunder to the ERS. ODOM shall be paid in full for any accrued vacation leave balance upon termination. ODOM will be paid fifty percent (50%) of any accrued sick leave balance, provided that the fifty percent (50%) maximum payment will be reduced two and one-half percent (2-1/2%) for each year less than twenty (20) years of creditable service upon termination pursuant to the procedure outlined in Oklahoma City's Personnel Policies, adopted on July 18, 2017, or as may be amended. If she is involuntarily terminated from employment, she shall not entitled to be compensated for any accrued sick leave.

13. **OWNERSHIP OF DOCUMENTS, EQUIPMENT AND OTHER MATERIALS.**

Documents and other materials or property (including keys, badges, and defender tokens) pertaining to the services rendered hereunder or prepared in connection therewith, are the property of the ERS and will be delivered to the ERS upon termination of this agreement for whatever reason.

14. **NO ASSIGNMENT OF THE CONTACT.** This contract may not be assigned.

15. **NATURE OF RELATIONSHIP.** The parties agree that ODOM is an employee of the ERS.

The remainder of this page is intentionally left blank. Signatures follow on next page.

NOW, THEREFORE, in consideration of the promises and mutual obligations herein set forth, the parties hereby covenant and agree with each other this 9th day of May 2024.

“EMPLOYEE”

BY: Angel Odom
Angel Odom

“EMPLOYER”

THE OKLAHOMA CITY EMPLOYEE
RETIREMENT SYSTEM

ATTEST:

Amy K. Simpson
Secretary

Paul E. Bronson
Chairman

Reviewed for form and legality

Richard E. Mahoney
Assistant Municipal Counselor

Exhibit A

Oklahoma City Employee Retirement System

PAY GRADES / STEPS

Grade	Step 1	Step2	Step3	Step4	Step 5	Step 6	Step 7	Step 8	Step9	Step 10	Step 11	Step 12	Step 13
802 hourly	\$61,721.28 \$29.56	\$63,976.32 \$30.64	\$66,294.00 \$31.75	\$68,716.08 \$32.91	\$71,221.68 \$34.11	\$73,748.16 \$35.32	\$76,399.92 \$36.59	\$79,072.56 \$37.87	\$81,933.12 \$39.24	\$84,856.32 \$40.64	\$87,904.80 \$42.10	\$91,099.44 \$43.63	\$94,356.72 \$45.19
804 hourly	\$75,042.72 \$35.94	\$77,715.36 \$37.22	\$80,575.92 \$38.59	\$83,520.00 \$40.00	\$86,484.96 \$41.42	\$89,596.08 \$42.91	\$92,832.48 \$44.46	\$96,131.52 \$46.04	\$99,639.36 \$47.72	\$103,272.48 \$49.46	\$106,968.24 \$51.23	\$110,747.52 \$53.04	\$114,777.36 \$54.97
806 hourly	\$95,818.32 \$45.89	\$99,263.52 \$47.54	\$102,792.24 \$49.23	\$106,488.00 \$51.00	\$110,309.04 \$52.83	\$114,338.88 \$54.76	\$118,368.72 \$56.69	\$122,649.12 \$58.74	\$127,033.92 \$60.84	\$131,669.28 \$63.06	\$136,346.40 \$65.30	\$141,253.20 \$67.65	\$146,389.68 \$70.11

Additional:

- 802 range represents Retirement System Analyst position
- 804 range represents Retirement System Specialist position
- 806 range represents Retirement System Manager position

802, 804 and 806 respectively correspond to pay ranges 513, 517, and 522 of the City of Oklahoma City’s Management, Administrative & Technical Support Pay Plan Effective July 1, 2023 (approved by City Council on August 29, 2023).

Exhibit B

Note: This is a Trust position (not a City position) and is under the supervision of the Board of Trustees of the Oklahoma City Employee Retirement System.

SALARY

The approved salary range for this position is **\$75,043 - \$114,777** annually and is dependent upon the qualifications and experience of the selected candidate.

Note: *Applications/resumes will be accepted until the position is filled. First consideration will be given to applications/resumes received by **February 21, 2024**.*

DEPARTMENTAL INFORMATION

The Oklahoma City Employee Retirement System (OCERS) is a \$855 million public retirement system for non-uniformed employees of the City of Oklahoma City. The OCERS has an active membership of approximately 2,500 employees and a retired membership of approximately 1,700. The current number of employees participating in the 457(b) plan is approximately 3,100, and the current number of employees participating in the 401(a) plan is 64.

JOB SUMMARY

The Deferred Compensation Specialist is located in the Employee Retirement System office and reports to the Retirement System Manager. The Deferred Compensation Specialist will be responsible for the administration of governmental 457(b) plans and 401(a) Money Purchase plans offered by the City of Oklahoma City and representing the governmental 457(b) plans and 401(a) Money Purchase plans during the Oklahoma City Deferred Compensation Board meetings.

ESSENTIAL JOB FUNCTIONS

- Enters and reviews enrollments and deferral changes for governmental 457(b) plan participants.
- Communicates retirement plan concepts to active and retired employees.
- Administers the 401(a) Money Purchase Plans for new enrollments.
- Processes 457(b) special catchup enrollments in accordance with IRS/DOL regulatory compliance.
- Processes retirement loan requests.
- Serves as point of contact in the management of vendor contracts.
- Plans and coordinates retirement educational opportunities to active and retired employees.
- Prepares quarterly Deferred Compensation Board meeting agenda.
- Compiles and evaluates large quantities of data and generates reports.
- Interprets and/or explains retirement regulations.
- Performs other duties as assigned.

MINIMUM QUALIFICATIONS

- Bachelor's degree in Finance, Business, or a related field, or five plus (5+) years' experience in payroll, benefits, or retirement functions.

KNOWLEDGE, SKILLS, AND ABILITIES

- Knowledge of practices used in the administration of comprehensive benefits and retirement principles and concepts.
- Knowledge of various IRS codes; 457(b), 401(k), 401(a), etc.
- Knowledge of IRS regulatory, requirements, state statutes, municipal code, and retirement plan document interpretation.
- Knowledge of and skill in utilizing basic research principles and practices.
- Knowledge of payroll systems, practices, and techniques.
- Knowledge of Oklahoma Open Meetings and Open Records Acts.
- Knowledge of public procurement policies.
- Experience communicating retirement plan concepts.
- Experience in organizing, recording, and working accurately with large quantities of financial data.
- Proficiency in the use of computer applications such as Microsoft Word, Access, and Excel to produce professional reports, create spreadsheets, and analyze data.
- Ability to prepare, review, and process a variety of retirement calculations via the electronic information system.
- Ability to read, interpret, and explain contracts from financial, administrative, and consulting providers.
- Ability to work under pressure and stress to meet deadlines.
- Ability to apply principles of logical thinking and problem solving.
- Ability to work with very sensitive information while maintaining the highest degree of confidentiality.
- Ability to effectively develop and maintain working relationships.
- Skill in effectively communicating verbally and in writing with diplomacy and tact.
- Skill in maintaining manual and electronic records management systems.
- Ability to travel.

COMPETENCIES

- **Execution and Results:** (1) Sets well-defined and realistic goals and high standards of performance for self or self and others; (2) displays a high level of initiative, effort, and commitment toward performing work; (3) completes assignments in a thorough, accurate, and timely manner, and delivers results; (4) works with minimal supervision, is motivated to achieve, and demonstrates responsible behavior; (5) demonstrates understanding of all aspects of the job and application of accrued knowledge in carrying out duties and responsibilities; technical knowledge; skill in the techniques, equipment, procedures, and work required; (6) recognizes opportunities and takes action for improvement to programs, policies, procedures, practices, and processes; (7) understands and is able to apply the principles, methods, and tools of quality improvement; (8) collects, examines, analyzes, and interprets data from a variety of sources; (9) makes data-driven recommendations/decisions and achieves results; (10) effectively achieves results through others to achieve the Department or City's mission.
- **Judgment:** (1) Plans, coordinates, and executes business functions efficiently, effectively, and in a fiscally responsible manner; (2) identifies risks and develops and implements measures to avoid, mitigate, or minimize those risks; (3) makes effective, timely, well-informed, objective, and transparent work-related decisions; (4) exhibits emotional maturity and stability, effectively manages conflict, and remains optimistic and calm during stressful situations; (5) uses resources effectively to achieve results aligned with organizational priorities; (6) applies understanding of financial management/budgeting principles to ensure decisions are fiscally sound and responsible and in accordance with policies, procedures, processes, rules, regulations, and laws; (7) makes business decisions that drive positive, fiscally responsible

performance; (8) manages ambiguity, business insight, financial acumen, makes decisions using data and insight that achieves the best outcome for the department and City.

- **Teamwork/Team Oriented:** (1) Recognizes, values, and leverages the ideas, opinions, and perspectives of others; (2) participates willingly and effectively as a team lead or team member; (3) builds consensus; fosters team commitment, spirit, pride, and trust; (4) collaborates with others to accomplish goals and objectives and achieve results; (5) expresses facts, ideas, messages, and information (technical and non-technical) to individuals or groups clearly, concisely, accurately, understandably, with honesty, tact, and diplomacy and in a manner that is appropriate for the intended audience; (6) actively listens, clarifies information as needed.
- **Customer Centric:** (1) Demonstrates commitment to public service; (2) serves and satisfies internal and external customers in a timely and effective manner; (3) establishes, commits to, and maintains high standards for producing quality work products and being responsive to customers; (4) supports the Department/City's mission; develops and executes strategies with the customer in mind.
- **Strategic Thinking:** (1) Thinks conceptually, imaginatively, and systematically; (2) envisions the future; (3) defines the vision, direction, and goals; (4) develops a road map for achievement; (5) anticipates change and plans for it; (6) considers long-term value and consequences; (7) influences others to achieve results; (8) understands where the organization is headed; knows the organization's mission and functions, and how its social, political, and technological systems work; (9) aligns business strategies to long-term success of the City; (10) sets the vision, direction and compelling course of action; (11) operates effectively within the systems, programs, policies, procedures, codes, ordinances, rules, and regulations of the organization; (12) knows industry and stays ahead of best practices; (13) understands the political environment, management priorities, staff roles and responsibilities, and grasps external factors impacting the organization; (14) identifies when issues need to be escalated to higher authorities and effectively alerts appropriate officials.
- **Leads Through Influence:** (1) Persuades others; builds consensus through give and take; (2) gains cooperation from others to obtain information and accomplish goals; (3) works with others towards achieving agreements that may involve exchanging resources or resolving differences; (4) understands the concepts, practices, and techniques used to identify, engage, influence, and monitor relationships with individuals and groups connected to a work effort including those actively involved; (5) leads through influence over the process and its results, and those who have a vested interest in the outcome (positive or negative).
- **Commitment to Continuous Improvement:** (1) Recognizes opportunities for improvement with regard to programs, policies, procedures, practices, and processes; (2) understands and is able to apply the principles, methods, and tools of quality improvement; (3) collects, examines, analyzes, and interprets data from a variety of sources; (4) makes data-driven recommendations/decisions and achieves results.
- **Agility:** (1) Values collaboration, communication, and feedback and is flexible and open to new ideas; (2) learns rapidly and transforms learning into action; (3) examines processes and practices to perform work most effectively; (4) demonstrates courage and willingness to take calculated risks; (5) assesses readiness; proposes new approaches, methods, and technologies plans, implements, and evaluates change in a transparent, positive, and thoughtful manner; (6) exhibits emotional maturity and stability, effectively manages conflict, and remains optimistic and calm during stressful situations; (7) rapidly adapts to change and leads others through change, while producing tangible results and identifying new opportunities.
- **Talent Development:** (1) Provides tools, materials, equipment, and resources; (2) provides performance feedback, coaching, mentoring, encouragement, and support; (3) discusses personal and professional goals; (4) provides formal and informal learning and development opportunities that support achievement of personal and professional goals; (5) attracts and develops talent; (6) manages performance throughout the department or City; (7) sets the leadership tone for area of responsibility. Note: This competency is not applicable for employees who are not supervisors.

- **Inclusive Leadership:** (1) Fosters a diverse, equitable and inclusive workplace where individual differences are valued, and employees feel a sense of belonging; (2) seeks to know and learn about others; welcomes diversity in ideas, perspectives, and thoughts; understands and respects values, attitudes, and beliefs of others; (3) seeks to build diverse teams through inclusive hiring practices (ensures opportunity for individuals of all backgrounds and demonstrates a commitment to hiring the most qualified candidates); (4) cultivates engagement, team building, collaboration; (5) instills trust; (6) recognizes contributions and celebrates accomplishments; (7) promotes the advancement of all employees including those of marginalized identities (e.g., coaching, mentoring, providing personal and professional development opportunities); (8) actively participates in and encourages others to participate in diversity and inclusion programming and/or training; (9) strategically integrates inclusion into business practices and decisions; (10) demonstrates respect, inclusiveness, understanding, tact, diplomacy, and professionalism in developing and maintaining effective working relationships with others; (11) effectively manages one's own feelings and emotions; (12) builds diverse teams, promotes advancement of marginalized employees, participates and encourages participation of I&D initiatives. Note: This competency is not applicable for employees who are not supervisors.

WORKING CONDITIONS

- Primarily indoors in a climate-controlled environment.
- Occasional local or out-of-town travel to meetings, conferences, or seminars.
- Occasionally required to work hours beyond normal scheduled work week.

PHYSICAL EFFORT

- Near vision enough to read a video display terminal and draft communications such as written, or machine generated documents, reports, etc.
- Hearing and speech enough to communicate by telephone or face-to-face.
- Manual and finger dexterity enough to operate equipment such as a computer keyboard, keyboard mouse, telephone, calculator, etc.

Note: *The working conditions and physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential job functions.*

OTHER DETAILS

Pay Method: Employees are required to receive pay electronically, either via direct deposit or pay card.

Background Investigation: Upon a conditional offer of employment/acceptance of position, the City of Oklahoma City will conduct a criminal history background check for external applicants. Applicants will be provided contact information for any third-party reporting agencies used to collect background information in connection with conditional offers of employment.