



Manager, Retirement Administration Job Description

JOB INFORMATION

<i>Job Code:</i>	117047
<i>Job Title:</i>	Manager, Retirement Administration
<i>FLSA Status:</i>	Exempt
<i>Supervisory:</i>	Supervises employees and/or student workers.
<i>Job Family:</i>	Employee Benefits
<i>Job Family Group:</i>	Human Resources
<i>Management Level:</i>	5 Manager

JOB SUMMARY

Directly manages the retirement program's daily operations, various administrative functions and service delivery throughout the university. Contributes to the department's strategic planning efforts.

JOB QUALIFICATIONS:

Education

<i>Req</i>	<i>Pref</i>	<i>Degree</i>	<i>Field of Study</i>	
X		Bachelor's degree		
	X	Master's degree	Business Administration	
	X	Master's degree	Accounting	
	X	Master's degree	Economics	
	X	Master's degree	in related field(s)	

Additional Education

Check here if experience may substitute for some of the above education.

Combined experience/education as substitute for minimum education

Work Experience

<i>Req</i>	<i>Pref</i>	<i>Work Experience</i>	<i>Experience Level</i>	
X		7 years	in HR and/or retirement administration	And
X		1 year	in a leadership/management role	
	X	10 years	in higher education	And
	X	4 years	in a leadership/management role	

Additional Work Experience

Check here if education may substitute for some of the above work experience.

Combined experience/education as substitute for minimum work experience

Knowledge, Skills and Abilities

<i>Req</i>	<i>Pref</i>	<i>Functional Skills</i>
X		Advanced working knowledge and understanding of retirement plan administration and associated regulations and IRS tax rules.
X		Experience ensuring compliance with applicable laws and regulations.
X		Experience performing retirement saving administration in a high volume, fast paced environment.
X		Experience performing all facets of daily plan administration (e.g., processing of contributions, distributions, hardship withdrawals).
X		Experience performing non-discrimination and other testing, providing strategic alternatives for correction of failures and presenting options to improve future non-discrimination tests.
X		Experience managing a team to achieve goals and drive positive change.
X		Demonstrated excellence providing personalized customer service.
X		Demonstrated project management experience, providing effective oversight from inception to delivery.
X		Demonstrated ability to effectively manage time, prioritize tasks, work independently and maintain confidentiality.
X		Strong research, analytical, critical thinking, problem-solving and decision-making skills.
X		Proficiency with Microsoft Office.
X		Excellent written and oral communication skills and experience communicating with a wide variety of internal and external business partners.
	X	Experience in a benefits administration position in higher education.
	X	Experience working closely with senior leadership and executives, including identifying needs, developing action plans, identifying deliverables, and presenting results and recommendations.
	X	Ability to identify knowledge and resource gaps and utilize industry trends to create opportunities for development.
	X	Ability to train staff on emerging industry trends to ensure quality baseline of department knowledge.

Certifications

<i>Req</i>	<i>Pref</i>	<i>Select Certifications</i>	<i>Enter Additional Certifications</i>
	X		ASPPA Service Provider Certification, or other similar certification.
	X	Certified Employee Benefits Specialist - CEBS (IFEBP)	
	X	Certified Compensation Professional - CCP (WorldatWork)	

Other Job Factors

JOB ACCOUNTABILITIES

	<i>% Time</i>	<i>Essential</i>	<i>Marginal</i>	<i>N/A</i>
Plans and develops retirement program objectives and services. Manages the delivery of retirement services to employees and/or other targeted program participants or beneficiaries. Consults with and advises employees on retirement plan and related issues. Provides information, options and documentation. Assists employees in determining retirement date, coordinating health benefits with social security and securing appropriate documentation. Serves as a key resource for retirement information. Resolves problems or questions referred by staff, university administrators, or professionals outside the university.				
Researches and identifies retirement trends, needs, and regulations, and establishes alternative or updated program services accordingly. Sets and communicates program priorities and performance standards, assessing operations using these criteria. Plans and conducts quality assurance reviews and recommends changes as appropriate. Assesses quality of retirement services, modifying or creating new options as needed. Directs the development, maintenance and enhancement of electronic systems to support operations. Coordinates with other offices to ensure compatibility of related systems.				
Plans audits and works with auditors and actuaries. Provides documents, information on plan procedures, and compliance with plan guidelines and IRS regulations. Develops and maintains records of participants and beneficiaries including active, deferred, retired, and separated members. Authorizes pension				

JOB ACCOUNTABILITIES

	<i>% Time</i>	<i>Essential</i>	<i>Marginal</i>	<i>N/A</i>
loan and withdrawal payments from benefit retirement plan. Determines and verifies eligibility and amount of employee benefit payments. Ensures documents are compliant.				
Informs management of retirement trends and developments, providing advice and counsel. Assesses impact of new legislation on existing programs and makes changes as appropriate. Manages assigned staff. Recommends organizational structure, reporting relationships and staffing needs based on program goals. Makes hiring, promotional and salary decisions in accordance with university policy. Provides staff performance appraisals and determines need for disciplinary action. Counsels and disciplines staff, as needed.				
Manages the dissemination, interpretation, and application of policies, and recommends and/or approves exceptions. Develops communication strategies (e.g., training/information sessions, newsletters, event planning) and links retirement services and operations with relevant departments. Conducts group benefits presentations for groups and/or individual interviews with employees regarding retirement and pension options. Participates in the development and administration of policies and procedures.				
Promotes an environment that fosters inclusive relationships and creates unbiased opportunities for contributions through ideas, words, and actions that uphold principles of the USC Code of Ethics. Maintains professional currency through active participation and leadership in internal/external associations and committees.				

Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC’s policy at: https://policy.usc.edu/mandated-reporters/
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC’s policy at: https://dps.usc.edu/alerts/clery/			No

ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

Print Employee Name

Signature

Date

Print Manager Name

Signature

Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.