



JOB INFORMATION

<i>Job Code:</i>	117045
<i>Job Title:</i>	Lead, Retirement Administration
<i>FLSA Status:</i>	Exempt
<i>Supervisory:</i>	May lead one or more employees performing similar work.
<i>Job Family:</i>	Employee Benefits
<i>Job Family Group:</i>	Human Resources
<i>Management Level:</i>	8 Individual Contributor

JOB SUMMARY

Responsible for overseeing the day-to-day operations of retirement benefits and provides advanced support and guidance to both employees and staff. Develops and implements strategic initiatives, policies, and training to help manage and provide support for employees, retirement programs, and retirement services. Maintains records, leads quality control, and performs analysis as needed.

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	Or
	X	Master's degree	Accounting	Or
	X	Master's degree	Economics	

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		
	X	9 years		

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, associated regulations, and IRS tax rules.
X		Experience ensuring compliance with applicable laws and regulations.
X		Experience performing daily plan administration (e.g., processing of contributions, distributions, hardship withdrawals, QDROs).
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		Demonstrated excellence in providing personalized customer service.
X		Demonstrated project management experience, providing effective oversight from inception to delivery.
X		Strong research, analytical, critical thinking, problem-solving, and decision-making skills.
X		Ability to work proactively, independently, or as part of a team, prioritizing competing assignments.
X		Ability to exercise discretion with confidential information.
X		Proficiency with Microsoft Office.
X		Excellent written and oral communication skills, with experience communicating with a wide variety of internal and external business partners.
X		Proven track record of building collaborative relationships with a wide range of internal/external stakeholders.
	X	Experience in a benefits administration position in higher education.
	X	Experience in leadership roles, including managing a team to achieve goals and drive positive change.
	X	Experience working closely with senior leadership and executives, including identifying needs, developing action plans, identifying deliverables, and presenting results and recommendations.
	X	Excellent conflict resolution skills.
	X	Experience with HRIS software and case management systems.
	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 a 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)
	X		Certified Compensation Professional (CCP)
	X		Certified Plan Sponsor Professional (CPSP)
	X		Qualified 401(k) Administrator (QKA)
	X		Qualified 401(k) Consultant (QKC)
	X		Qualified Pension Administrator (QPA)
	X		Certified Pension Consultant (CPC)

Other Job Factors

JOB ACCOUNTABILITIES

	<i>% Time</i>	<i>Essential</i>	<i>Marginal</i>	<i>N/A</i>
Collaborates with the management to plan, develop, and improve retirement program objectives and services. Oversees the delivery of retirement services, ensuring high-quality support for employees and other program participants. Assists in the development and enhancement of electronic systems to support retirement operations.				
Serves as a primary resource for employee support regarding retirement inquiries, providing detailed information, options, and documentation. Assists employees in determining retirement dates, coordinating health benefits with social security, and securing appropriate documentation. Facilitates difficult conversations between employees and managers regarding retirement transitions as needed.				

JOB ACCOUNTABILITIES

	<i>% Time</i>	<i>Essential</i>	<i>Marginal</i>	<i>N/A</i>
Develops, implements, and interprets procurement policies to ensure compliance with federal and university regulations. Adapts existing methods and procedures to meet changes in federal requirements and university needs. Ensures standard operating procedures are documented for all key Conducts quality assurance reviews and recommend changes to improve retirement service. Ensures compliance with plan guidelines, applicable regulations, and university policies. Works with auditors and actuaries to provide necessary documents and information as needed.				
Develops and conduct training sessions, workshops, and presentations on retirement topics for employees and staff. Creates and distributes educational materials, ensuring employees are well-informed about their retirement options and benefits. Maintains effective communication channels with internal and external stakeholders. Works to maintain professional currency through active participation and leadership in internal/external associations and committees.				
Analyzes demographic data and trends impacting retirement plans and policies. Provides insights and recommendations to management based on data analysis. Maintains accurate records of retirement plan participants and beneficiaries. Stays informed about new legislation and its impact on retirement programs. Advises management on necessary changes to existing programs and policies. Ensures the dissemination, interpretation, and application of policies are consistent and effective.				
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.				

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/			

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.