



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>	6 Manager

Manager, Retirement Administration

JOB SUMMARY

Owns the implementation and coordination of the university’s retirement tracks and programs, and collaborates on plan design considerations. Enables the strategy for the retirement department, responsible for administration of the retirement plan and associated regulatory administration requirements, and ensures that the retirement savings administration team is performing at high capacity in their day-to-day operations. Serves as an essential team member or project manager for key retirement plan initiatives. Brings exemplary customer and relationship management skills to successfully foster a cohesive team environment and strong relationships with university partners and external vendors. Helps enable the university's vision while championing its culture and values.

JOB QUALIFICATIONS:

Education

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

Additional Education

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

X 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		8 years	in HR and/or retirement administration	And

Work Experience

Req	Pref	Work Experience	Experience Level	
X		2 years	in a leadership/management role	
	X	10 years	in HR and/or retirement administration	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

Req	Pref	Functional Skills
X		Bachelor's degree in business, accounting, finance, economics, or another related field.
X		Advanced working knowledge and understanding of retirement plan administration, associated regulations and IRS tax rules.
X		Experience in retirement plan administration in a high volume, fast paced environment.
X		Experience performing all facets of daily qualified and non-qualified plan administration including but not limited to processing of contributions, loans, distributions, hardship withdrawals, QNECs and QDROs.
X		Experience performing non-discrimination and other testing and providing strategic alternatives for correction of failures and presents options to improve future nondiscrimination tests.
X		Experience ensuring compliance with applicable laws and regulations.
X		Experience managing a team by providing feedback, assessment, encouragement, and support 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		Excellent communication and facilitation skills with a wide variety of internal and external business partners and a proven track record of building strong collaborative relationships with senior stakeholders.
X		Strong research, analytical, critical thinking, problem solving skills and decision-making skills.
X		Proficiency with Microsoft Office applications (Word, Excel, Outlook, PowerPoint) ServiceNow and a working knowledge of Workday.
	X	Experience in retirement administration and/or higher education, including 401(a), 403(b), 401(k), 457(b) and defined benefit plans.
	X	Ability to promote change and build understanding, acceptance, and commitment of that change.
	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 comfort utilizing industry trends to create opportunities for development.
	X	Track record of positive influence of department culture during change through trust-building.
	X	Ability to train staff on emerging industry trends and ensure quality baseline of department knowledge.

Certifications

Req	Pref	Select Certifications	Enter Additional Certifications
	X		NAPA/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>
<p>Advises benefits leadership on matters pertaining to retirement programs. Providing managerial support to retirement savings administration specialists. Serving as a main point of contact for all retirement vendor relationships and partners within the HR organization. Reviewing and resolving escalated concerns and issues related to retirement plans and administration. Overseeing and advising on all facets of daily plan administration including processing of contributions, loans, distributions, hardship withdrawals. Demonstrating working knowledge and understanding of retirement plan administration and associated regulations and IRS tax rules.</p>				
<p>Supports leadership on fiscal management including budgeting and staffing. Communicating to team members how university retirement strategies drive long-term business goals through fostering culture and improving workforce retainment. Managing relationships between the university and any third parties, such as benefits consultants and administrators, to enable retirement program success. Researching and collaborating on appropriate benefit plan design alternatives based on data analysis and trends with appropriate team members.</p>				
<p>Supervises day-to-day operations related to retirement plan consultations and ensuring efficient support for team members. Communicating critical changes in a timely manner. Coaching team members to exhibit exemplary customer service when guiding faculty and staff through retirement planning and completion. Performing non-discrimination and other testing, providing strategic alternatives for correction of failures, and presenting options to improve future nondiscrimination tests.</p>				
<p>Communicates with team members openly and transparently to maintain efficiency, resolve challenges, and socialize current progress. Communicating with HR Systems & Data Analytics team and vendors as needed to ensure accurate data reporting and tracking. Providing timely and constructive feedback to team members to maintain high performance. Maintaining open lines of communication with the HR organization and serving as main point of contact for retirement vendor relationships. Communicating with clients and customers in a timely and professional manner. Conducting group benefits presentations for and/or individual interviews with employees regarding retirement and pension options. Coordinate with the service center on training needs and supporting development of knowledge base articles.</p>				
<p>Develops and maintains records of participants and beneficiaries including active, deferred, retired, and separated members.</p>				
<p>Monitors vendor activity including compliance with service level agreements, key metrics, and ongoing performance reporting.</p>				
<p>Evaluates work performance of members of retirement team in a fair and unbiased manner. Analyzing program utilization and collaborating on recommendations on initiatives to improve cost effectiveness. Managing, reviewing and resolving escalated retirement issues. Demonstrating fairness, impartiality, and integrity in decision making.</p>				
<p>Leverages retirement programs as a mechanism to highlight university culture and bolster USC's reputation as a destination employer. Communicating understanding of alignment between retirement to overall HR strategy to direct reports to ensure a common team direction. Demonstrating, through words, actions, and ideas, alignment to USC's strategic plan and the HR organization's strategic plan. Enabling the university to fulfill its academic and people missions through enhanced HR service.</p>				
<p>Develops trusting, credible relationships from demonstrated ethical judgment, behavior and practiced confidentiality. Encourages a workplace culture where all employees are valued, value others and have the opportunity to contribute through their ideas, words and actions, in accordance with the USC Code of Ethics. Maintains professional currency through active participation and leadership in internal/external associations and committees.</p>				

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		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects

Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	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 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.