UNIVERSITY OF SOUTHERN CALIFORNIA

Staff Retirement Navigator

Job Code: 117046

Grade: 00
OT Eligible: No
Comp Approval: 5/13/2014

JOB SUMMARY:
Serves as university staff retirement concierge/navigator. Provides professional, personalized, confidential consultative services, technical expertise and advisement to staff considering retirement, those transitioning to retirement and to retirees. Develops and administers targeted educational and outreach programs to keep current staff and retirees informed of opportunities, benefits and perquisites associated with retirement. Develops and conducts retirement workshops, information sessions, and/or programs.

JOB ACCOUNTABILITIES:

E/M/NA % TIME

Provides professional, personalized, confidential consultative and counseling services, technical expertise and advisement to staff considering retirement, those transitioning to retirement, and to retirees. Meets with staff contemplating retirement and focuses on individual needs. Facilitates the retirement process for staff so they understand retirement options, including financial alternatives, scenarios and implications. Provides assistance to staff with difficult conversations with managers surrounding their planned transition. Assists staff navigate the internal university systems and processes. Anticipates potential problems and impediments to retirement. Seeks resolution to problems as they arise in an effective and efficient manner. Assists newly retired employees who may face unforeseen difficulties transitioning.

Develops and administers targeted educational and outreach programs and activities to keep current staff and retirees better informed of opportunities, benefits, and perquisites associated with retirement including services and activities such as ensuring financial and lifestyle readiness, marketing USC Gold Care benefits and discounts, activities sponsored by the Staff Retirement Association and Emeriti Center etc. Creates, designs and administers a program to recognize retirees. Plans and develops objectives and/or content for program(s). Assesses quality of program operations. Modifies existing program services, as needed. Makes recommendations to management for modifications to existing or new programs and policies.

Develops, plans, conducts and schedules staff presentations, programs and transition workshops and/or information sessions on various retirement topics for group settings or individual consultations. Determines topics for programs, workshops, or information sessions. Arranges for guest speakers to present current information and updates on important retirement topics for group sessions. Makes available to staff a wide range of information materials such as pamphlets and brochures.

Manages short-term projects including planning, coordinating, scheduling and organizing project activities to meet objectives. Assists in driving special projects through various stages of the project lifecycle including project initiation, planning, execution and closure. Analyzes data and reports on changes in demographics and trends that impact retirees and university benefit plans and policies. Makes recommendations based on findings, as appropriate.
Serves as a liaison between staff members and relevant offices and organizations within the university and outside agencies and organizations. Provides critically important and appropriate links to staff and programs managed by Benefits Administration, the Emeriti Center, Center for Work and Family Life, and other resources promoting health and welfare, such as referrals to financial counseling and legal services, navigating health care market, referrals to social/family services, or assisting in a time of crisis.

Develops communications strategies and plans to promote and market staff retirement concierge services. Develops written and web-based retirement materials to inform staff about available resources, opportunities, benefits and perquisites, etc. Assesses and evaluates effectiveness of informational materials and communication vehicles and makes modifications as appropriate.

Keeps in contact with and surveys retirees to evaluate effectiveness of support and outreach programs. Ensures contact information remains current. Attends university retiree committee meetings to obtain feedback. Makes presentations, as requested.

Develops and maintains a network of professional internal and external contacts to facilitate retirement services for staff. Maintains currency of available internal and external retirement resources for staff considering retirement, those transitioning to retirement and to retirees. Stays abreast with health and welfare programs, services, resources and trends in the market place.

*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.

**EMERGENCY RESPONSE/RECOVERY:**

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<th>Essential</th>
<th>No</th>
<th>Yes</th>
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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.

**JOB QUALIFICATIONS:**

**Minimum Education:**

Bachelor's degree

Combined experience/education as substitute for minimum education

**Minimum Experience:**

3 years

**Minimum Field of Expertise:**

Directly related relevant experience in areas such as social work, benefits counseling and customer service. Administrative or program/project administration experience. Demonstrated experience with developing and administering programs with creativity. Demonstrated interpersonal, communication, problem solving, and critical thinking skills. Knowledge of benefits and social services such as social security, Medicare and Obamacare. Ability to build strong, supportive relationships.

**Preferred Field of Expertise:**

Experience in or familiarity with higher education

**Skills:** Other:
Analysis
Assessment/evaluation
Communication -- written and oral skills
Consulting
Counseling
Customer service
Interpretation of policies/analyses/trends/etc.
Knowledge of applicable laws/policies/principles/etc.
Organization
Planning
Problem identification and resolution
Project management
Public speaking/presentations
Research
Scheduling

Skills: Machine/Equipment:

Calculator
Computer network (department or school)
Computer network (university)
Computer peripheral equipment
Fax
Personal computer
Photocopier

Supervises: Level:

May oversee student, temporary and/or resource workers.

SIGNATURES:

Employee: ___________________________ Date: ___________________________

Supervisor: ________________________ Date: ___________________________

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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