UNIVERSITY OF SOUTHERN CALIFORNIA

Benefits Retirement Manager

Job Code: 117047

Grade: K
OT Eligible: No
Comp Approval: 7/7/2008

JOB SUMMARY:

Manages the daily operations of the retirement program of the university. Directly manages program operations and administrative functions to include planning, scheduling, policy implementation, personnel administration and delivery of services university wide. Contributes to strategic planning efforts. Reports to Director.

JOB ACCOUNTABILITIES:

**E/M/NA % TIME**

______ Plans and develops retirement program objectives and services. Researches and identifies retirement trends, needs and regulations and establishes program services accordingly. Assesses quality of retirement services. Modifies existing services and/or creates new services. Links retirement services and operations with other relevant departments on campus.

______ Manages staff assigned to retirement program. Recommends organizational structure, reporting relationships and staffing needs based on program goals. Makes hiring, promotional and salary decisions in accordance with university policy. Provides performance appraisals for staff and determines need for disciplinary action. Counsels and disciplines staff, as needed.

______ Manages the delivery of retirement services to employees and/or other targeted program participants or beneficiaries. Sets and communicates program priorities and performance standards and assesses operations using these criteria. Plans and conducts quality assurance reviews and recommends changes as appropriate.

______ Authorizes pension loan and withdrawal payments from benefit retirement plan. Determines and verifies eligibility and amount of employee’s benefit payment. Ensures documents are in compliance.

______ Consults with and advises employees on retirement plan and issues. Projects benefit payments and/or provides information, options and documentation. Assists employee on determining retirement date, coordinating health benefits with social security and securing appropriate documentation. Coordinates with employee, social security and department regarding retirement transition.

______ Plan audits and works with auditors and actuaries. Provides documents, information on plan procedures and compliance with plan guidelines and IRS regulation.

______ Participates in development and administration of policies and procedures. Manages the dissemination, interpretation and application of policies and recommends and/or approves exceptions.

______ Develops strategies for communicating retirement services such as training and information sessions, personal networking, newsletters, publications or other communications materials, and events planning.
Directs the development, maintenance and enhancement of electronic retirement systems to support operations. Coordinates with other university offices to ensure compatibility of related systems.

Serves as a key resource for retirement information. Resolves problems or questions referred by staff, university administrators, or professionals outside the university.

Informs management of trends and developments in retirement field. Gives advice and counsel regarding current developments. Assesses impact of legislation on existing programs and makes changes as appropriate.

Maintains professional currency through active participation and leadership in associations and committees both internal and external to the university.

Develops and implements security related procedures such as office opening and closing routines, recognition of duress signals and key controls. Coordinates security activities with university Public Safety Department. Promotes and maintains standards for security conscious awareness and behavior. Maintains knowledge of university’s crime prevention and suppression programs and services. Ensures dissemination of security related information to staff.

Performs other related duties as assigned or requested. The university reserves the right to add or change duties at any time.

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

EMERGENCY RESPONSE/RECOVERY:

Essential:  

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 work experience and education as equivalent

Minimum Experience:

3 years

Minimum Field of Expertise:

Directly related experience in supervising or managing a personnel/benefits program. Considerable knowledge of federal and state laws and regulations related to employee retirement benefits.

Preferred Education:

Master's degree

Preferred Experience:
Skills: Other:

- Analysis
- Assessment/evaluation
- Budget control
- Coaching
- Communication -- written and oral skills
- Conceptualization and design
- Conflict resolution
- Consulting
- Counseling
- Customer service
- Human resource process and employment knowledge
- Interpretation of policies/analyses/trends/etc.
- Interviewing
- Knowledge of applicable laws/policies/principles/etc.
- Managerial skills
- Negotiation
- Networking
- Organization
- Planning
- Problem identification and resolution
- Project management
- Public speaking/presentations
- Research
- Scheduling
- Staff development
- Statistical analysis
- Teaching/Training

Skills: Machine/Equipment:

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

Supervises: Level:

Supervises employees and/or student workers.

Supervises: Nature of Work:

- Administrative
- Clerical/Secretarial
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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