



JOB INFORMATION

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|--------------------------|---|
| <i>Job Code:</i> | 117046 |
| <i>Job Title:</i> | Staff Retirement Navigator |
| <i>FLSA Status:</i> | Exempt |
| <i>Supervisory:</i> | May oversee student, temporary and/or resource workers. |
| <i>Job Family:</i> | Employee Benefits |
| <i>Job Family Group:</i> | Human Resources |
| <i>Management Level:</i> | 7 Individual Contributor |

JOB SUMMARY

Provides professional, personalized, confidential consultative services, technical expertise, and advisement to employees considering retirement, those transitioning to retirement, and to retirees. Develops and administers targeted educational outreach programs to keep employees and retirees informed of retirement opportunities, benefits and regulatory notices.

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 | Economics | Or |
| | X | Master's degree | Psychology | Or |
| | 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 retirement navigation. | |
| | X | 10 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. |

Knowledge, Skills and Abilities

| Req | Pref | Functional Skills |
|-----|------|---|
| X | | Experience performing all facets of daily plan administration (e.g., processing of contributions, hardship withdrawals, QDROs). |
| X | | Experience performing non-discrimination and other testing, providing strategic alternatives for correction of failures and presenting options to improve future nondiscrimination tests. |
| X | | Demonstrated excellence providing personalized customer service. |
| X | | Excellent research, analytical, critical thinking, problem solving skills 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. |
| X | | Proven track record of building collaborative relationships with a wide range of internal/external stakeholders. |
| | X | Experience in higher education and in leadership roles. |
| | X | Excellent conflict resolution skills. |
| | X | Experience with HRIS software and case management systems. |

Certifications

| Req | Pref | Select Certifications | Enter Additional Certifications |
|-----|------|-----------------------|--|
| | X | | ASPPA Service Provider Certification, Certified Benefits Professional, Certified Employee Benefit Specialist, Certified Compensation Professional and/or other similar certifications. |

Other Job Factors

JOB ACCOUNTABILITIES

| | % Time | Essential | Marginal | N/A |
|---|--------|-----------|----------|-----|
| Facilitates the retirement process for employees so they understand their options (e.g., scenarios, implications). Plans and develops program objectives and content. Meets with employees contemplating retirement, focuses on their individual needs and helps with difficult conversations with managers surrounding planned transitions. Assists the navigation of internal university systems and processes, anticipating potential problems and seeking effective and efficient resolutions. Calculates support staff retirement pension plan benefits. | | | | |
| Develops, plans, conducts and schedules presentations, programs and transition workshops and information sessions on various retirement topics for group settings or individual consultations. Makes a wide range of materials (e.g., pamphlets) available. Manages short-term projects including planning, coordinating, scheduling and organizing project activities to meet objectives. Develops and administers targeted educational and outreach programs and activities (e.g., ensuring financial and lifestyle readiness). | | | | |
| Analyzes data on changes in demographics and trends impacting retirees and university benefit plans and policies. Makes recommendations based on findings, as appropriate. Provides banks with directives to start/stop payments or make demographic changes. Develops printed/online materials to communicate available resources (e.g., concierge services), opportunities, benefits and regulatory notices. Assesses and evaluates effectiveness of communication methods and materials and makes modifications as appropriate. | | | | |
| Assists newly retired employees who may face unforeseen difficulties transitioning. Serves as a liaison between employees and relevant internal/external stakeholders. Provides critically important and appropriate links to university- managed resources promoting health and welfare, (e.g., referrals to financial counseling and legal services). | | | | |
| Maintains contact with and surveys retirees to evaluate effectiveness of support and outreach programs. Attends university retiree committee meetings. Ensures contact data remains current. Maintains currency with available internal/external resources for employees considering retirement, those transitioning to retirement | | | | |

JOB ACCOUNTABILITIES

| | <i>% Time</i> | <i>Essential</i> | <i>Marginal</i> | <i>N/A</i> |
|---|---------------|------------------|-----------------|------------|
| and to retirees. Stays current with health and welfare resources and trends in the marketplace. | | | | |
| Builds and maintains strong relationships with customers, partners, and stakeholders to ensure consistency and quality of materials communicated. 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/ | | | 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.