

Updated: November 10, 2020
Title: Retirement Plan Employer Liaison
Staff Group: Ministries and Faith Development, Office of Church Staff Finances
Reports To: Retirement Plan Director
Location: Boston, Massachusetts* (preferred)
Grade: 11
Hours/Week: 35, Full-time with benefits

Purpose

To serve the Unitarian Universalist Organizations Retirement Plan—an IRS qualified 401(a)/401(k) defined contribution, multiple employer, church retirement plan—by assisting in overall plan management with a primary focus on educating Employers to help ensure legal compliance and drive better outcomes for participants. To improve UU Employers' plan knowledge and participant engagement while fostering responsive relationships. To work collaboratively with UUA colleagues, Retirement Plan Committee, UU Employers, participants, UUA-related professional groups, Plan Recordkeeper, and occasionally with consultants and legal counsel.

Principal Responsibilities

1. Serves as backup to the Retirement Plan Director in the overall management of the UU Organizations Retirement Plan.
2. Serves as the secondary liaison to the UUA Retirement Plan Committee. Prepares timely operational and non-discrimination reports and other briefing materials. Attends Committee meetings.
3. Creates and reinforces a learning culture with strong service and benefit compliance orientation.
4. Assists Employers, equipping them to serve their employees by consistent and proper administration of this benefit plan.
5. Identifies issues requiring additional education or Plan language clarification/amendments.
6. Develops and manages Employer compliance program, crafting Employer-educational materials which address their varying capacities and often relative inexperience with benefit plan administration.
7. Designs, launches and maintains Employers' annual attestation of compliance with all governing plan provisions, their Employer Participation Agreement on file with Plan Sponsor, as well as confirming participant and administrator listings.
8. Answers Employers' operational questions. Clearly conveys plan provisions, sharing successful plan administration strategies, procedures, and tools such as the Benefits Tune-Up Workbook.
9. Identifies, tracks, and confirms Employers' correction of operational errors.
10. Engages Recordkeeper as appropriate, ensuring resolution of Employers' and participants' issues.
11. Helps to evaluate contribution remittance aggregation systems. In cooperation with team, selects aggregator service.
12. Leads Employers' orderly transition to aggregated remitting.
13. Serves as backup for authorizing distributions and rollovers in accordance with Plan provisions, laws and regulations including clergy tax treatment rules, and recordkeeper rules and procedures.
14. Maintains an Operational Manual with complete, current documentation for all essential tasks.
15. Interprets questions and assists church volunteer leaders and others who are unfamiliar with benefits terminology and administrative requirements.
16. Conducts educational pre-screening with prospective Employers.
17. Prepares and presents educational videos, webinars, workshops, and Employer orientations. Conducts video or telephone conferences. Participates in periodic Retirement Planning Seminars.
18. Shares responsibility for crafting communications such as the Annual Plan Notice, the annual 1099 memo to retired UU clergy, employers' certification of plan compliance, how-to manuals, FAQs, etc.
19. Curates, maintains, and updates plan administration and planning-for-retirement content on and through the UUA website, periodic e-newsletters, social media outlets, and related publications.
20. Participates in continuing education opportunities to enhance knowledge of recordkeeper's participant education and engagement offerings and of relevant legislation and regulatory provisions.
21. May represent the Plan at regional and national events, and with UU professional organizations when significant participation by Employers or participants warrants Plan presence.
22. Works effectively with Retirement Plan Specialist and Retirement Plan Director, including planning and delivering educational events.
23. Actively participates in the Church Benefits Association.

24. Performs other duties as requested by supervisor, the Office of Church Staff Finances Director, the Co-Directors of Ministries and Faith Development, the Treasurer and Chief Financial Officer, the Executive Vice President, or the President.

Qualifications

This is a Grade 11 position (expected hiring range \$45,600-\$68,800 depending on experience). Note that qualifications may be met as a result of lived experience, volunteer work, professional experience, and/or formal or informal training. Requirements include:

- Exceptional oral, written and presentation skills.
- A strong service and benefit compliance focus working within the regulatory and fiduciary environment.
- Experience with retirement plans within the not-for-profit services market is desirable.
- Basic familiarity with clergy compensation is a plus.
- Excellent judgment around sensitive and confidential issues.
- Knowledge of Unitarian Universalist congregational life is helpful.
- A high degree of motivation, diligence and integrity.
- Exceptional attention to detail and organizational skills.
- Previous experience in benefits-related training and/or development of benefits-related learning materials is especially helpful.
- Highly proficient in video conferencing technology, Microsoft Office (Excel, Outlook, and Word), Raiser's Edge, website editing and an understanding of social media platforms.
- Work or lived experience with communities of color or indigenous peoples is of particular value.
- Eagerness to work in an organization in which the dismantling of white supremacy is a high priority.

* **IMPORTANT:** During the time of the COVID-19 pandemic, the Boston offices of the UUA remain closed, and as such, this will be a work-from-home position until our offices reopen.

How to Apply

People with disabilities, people of color, indigenous people, Hispanic/Latinx, and LGBTQ candidates are encouraged to apply. The UUA is committed to developing a diverse and talented staff team. If you are excited about this role, but are unsure whether you meet 100% of the requirements, we encourage you to inquire and/or apply. Send cover letter and résumé—indicating “Retirement Plan Liaison” in the subject line—via e-mail to careers@uua.org, via fax to (617) 948-6467, or to Human Resources, UUA, 24 Farnsworth Street, Boston, MA 02210. E-mail submissions preferred.

About the UUA

The Unitarian Universalist Association is a progressive religious denomination headquartered in Boston's waterfront Fort Point Innovation District with offices in Washington, DC and at the United Nations in New York City. Our faith community of more than 1,000 self-governing congregations brings to the world a vision of religious freedom, tolerance, and social justice. Our normal workweek is 35 hours, we pay 80% contribution towards health insurance premiums, 10% towards retirement (after one year), and have generous paid time-off policies. We are a great place to work and we value diversity. The UUA is an Equal Opportunity Employer and is committed to the full inclusion of all. As part of this commitment, the UUA will ensure that applicants and staff with disabilities are provided reasonable accommodations. If reasonable accommodation is needed to participate in the job application or interview process, to perform essential job functions, and/or to receive other benefits and privileges of employment, please contact the Office of Human Resources at (617) 948-4648 or humanresources@uua.org. For more information on the UUA, visit us online at UUA.org and uuworld.org.

Support for the Mission and Values of the Association

The Unitarian Universalist Association is a progressive and historic religious denomination. While it is not generally required or expected that an applicant/employee identify as a Unitarian Universalist (UU) or be a member of a UU congregation in order to work at the UUA, all UUA staff members are expected to perform their job duties in accordance with the UUA's values, principles and mission. In particular the following points, drawn from the Seven UU Principles, are of particular importance for the UUA's work environment and staff culture:

- The inherent worth and dignity of every human being: We affirm the need for a human-centered workplace that allows our diverse staff to flourish. We also understand that our wider culture and society oppresses and denies human dignity, and we seek to counter the effects of that oppression in our hiring and workplace culture so that each person feels whole and valued.

- Justice, equity and compassion in human relations, and the goal of world community with peace, liberty and justice for all: We speak openly and publicly of our support for social and political issues, including LGBTQ equity, racial justice, climate justice, gender equity, and reproductive justice.
- The interdependent web of existence: We recognize that the liberation of all people is interwoven, and we work to counter patriarchy, white supremacy, colonialism, homophobia, transphobia, ableism, environmental exploitation, and other interrelated systems of marginalization.