

Updated: November 23, 2021
Title: Retirement Plan Director
Staff Group: Ministries and Faith Development, Office of Church Staff Finances
Reports To: Office of Church Staff Finances Director
Location: Open*
Grade: 13, full-time with benefits

Purpose

To manage the Unitarian Universalist (UU) Organizations Retirement Plan ensuring high quality services to UU employers and to drive better outcomes for participants. To adhere to applicable laws and regulations governing IRS qualified retirement plans. To foster responsive relationships with colleagues, Retirement Plan Committee, UU employers, participants, professional groups, plan recordkeeper, investment consultant, and plan's legal counsel. To serve as a senior advisor to the Office of Church Staff Finances Director.

Note: The UUA Retirement Plan is a 401(a)/401(k) multiple employer church plan with assets exceeding \$550 million, 4300+ plan participants, and 620+ participating employers (as of November 2021).

Principal Responsibilities

1. Ensures plan compliance with all federal laws, regulations, and other legal requirements governing IRS qualified church plans.
2. Leads the retirement plan staff team. Collaborates with other Office of Church Staff Finances team members.
3. Primary liaison to the recordkeeper. Meets with recordkeeper staff regularly, monitoring performance, and assessing effectiveness of processes and controls. Identifies and resolves operational issues and service provider deficiencies.
4. Serves as the primary staff liaison to the Retirement Plan Committee. Works closely with the committee chair on short and long-term issues; conducts an annual analysis of the plan's operations. Works collaboratively on committee member recruitment criteria and process.
5. Serves as primary liaison to the plan's investment advisors, legal counsel, and other consultants. Identifies issues that require legal clarification and/or plan amendment. Oversees any RFP, RFI for plan service providers.
6. Works to ensure that the Retirement Plan Committee, investment advisors, recordkeeper, and other service providers integrate measures designed to reduce unconscious bias and to address issues of systemic racism and oppression.
7. Serves as secondary backup for reviewing and authorizing requests for distributions and rollovers in accordance with the plan provisions, laws, and regulations including clergy tax treatment rules, and recordkeeper rules and procedures.
8. Working with the recordkeeper, develops and maintains a comprehensive communication plan for direct outreach to participants and remitting employers geared to improve participant outcomes. Ensures the preparation of required and special communications to participants and employers including required notices and educational materials to help ensure compliance with plan provisions and accountability for accurate and timely contribution remittances.
9. Ensures that plan administration and planning-for-retirement content on and through the UUA website, e-newsletters, social media outlets, and other publications is accurately curated and maintained.
10. Coordinates and participates in webinars, seminars, workshops, and events to educate employers, participants, volunteer leaders, and members of UUA-related professional organizations.
11. Participates in continuing education opportunities to stay current with emerging legislative and investment services sector topics. Is familiar with recordkeeper's participant education and engagement offerings; assists service provider by referencing clergy-tax-related publications/rulings from the IRS.
12. Actively participates in the Church Benefits Association. Acts as liaison with the UU Retirement Ministers and Partners Association (UURMaPA) and serves as a resource to other UUA-related professional groups.
13. Performs other duties as requested by supervisor, 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 13 position (expected hiring range \$56,000-\$87,100 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:

- Bachelor's degree.
- At least 5 years' experience administering a multiple employer, 401k or 403b retirement plan with preference given to IRS qualified church plans or plans within the not-for-profit sector.
- Excellent judgment around sensitive and confidential issues.
- A strong customer service and benefits compliance focus working within the regulatory and fiduciary environment.
- Knowledge of clergy compensation and Unitarian Universalist congregational life is helpful.
- A high degree of motivation, diligence, and integrity.
- Exceptional attention to detail and organizational skills.
- Exceptional oral, written, and presentation skills.
- Highly proficient in Microsoft Office (Excel, Outlook, and Word), video conferencing technology (e.g., Zoom), 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.
- Occasional travel required including travel to the annual UUA General Assembly, 1-2 meetings of the Church Benefits Association, 4-6 committee/team meetings in Boston, and other UUA-related meetings each year.

* This is a remote, work-from-home position. Location is open in the continental United States. You should have easy access to a major airport due to the travel requirements of this position.

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 Director” 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. 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.