

Updated: March 30, 2022
Title: Retirement Plan Specialist
Staff Group: Ministries and Faith Development, Office of Church Staff Finances
Reports To: Retirement Plan Director
Location: Open*
Grade: 10, full-time with benefits

Purpose

To provide highly responsive customer service to the Unitarian Universalist Organizations Retirement Plan's participants and employers, working closely with the Plan Recordkeeper, Retirement Plan Employer Liaison, the Retirement Plan Director, Plan participants, UU employers, UUA colleagues, and the Retirement Plan Committee. To support the participants' enrollment and distribution process, employers' remitting process, and to ensure the accuracy of participant employment information.

Principal Responsibilities

1. Serving as the primary point of contact regarding direct services to participants, acts as a knowledge resource regarding basic plan provisions and reliable handling of participant data input and reporting. Answers common questions regarding distributions, eligibility, enrollment, and contribution remittance by referencing the Plan Documents, Retirement Plan Knowledge Base, the Retirement Plan webpages, and any other pertinent published information.
2. Reviews and authorizes requests for distributions and rollovers in accordance with the Plan provisions, laws, and regulations including clergy tax treatment rules, and recordkeeper rules and procedures.
3. Effectively handles communications and time-sensitive financial documents with Plan participants and the recordkeeper in an efficient and confidential manner.
4. Engages recordkeeper Customer Service Manager and client support staff to resolve participant-specific challenges including enrollment and distributions. Refers complicated or plan-wide challenges to Retirement Plan Employer Liaison or supervisor as appropriate.
5. Assists with the Plan's annual certification of employers' compliance and participation, including all communications and the gathering of employee census and staffing data.
6. Responds to Notice of Call, Benefits Transition/Employee Change form, Intent to Retire, Constituent Name Change, Administrative Access Request form, and other data-update notifications.
7. Shares responsibility with the Retirement Plan Employer Liaison in maintaining accurate, updated records of employees, plan participants, and authorized remitters for each participating employer.
8. Provides current remittance process instructions and any required documents or forms to authorized remitters.
9. Works to ensure the integrity of data within the recordkeeper's system, regularly updating records, ensuring transitions are documented clearly, and doing periodic spot-checks to identify and document participant issues or deficiencies; reports these to supervisor.
10. Responsible for recurring and special communications to participants (including the Annual Plan Notice, the Annual 1099R Memo to retired UU clergy, 402(g) notifications and others as required).
11. Works with Retirement Plan Employer Liaison to update forms such as the Employee Contributions Agreement and ensures that the Retirement Plan Knowledge Base and the UUA webpages reflect accurate information, current forms, and working links.
12. Contributes to departmental newsletter.
13. Responsible for handling periodic small balance rollouts.
14. Maintains an operational manual with complete, current documentation for all essential tasks.
15. Participates in continuing education opportunities to enhance knowledge of recordkeeper's participant education and engagement offerings and of relevant legislations and regulatory provisions.
16. Coordinates arrangements for quarterly Retirement Plan Committee meetings and other periodic webinars, workshops, and seminars. Handles hotel accommodations, meals, refreshments; supports presenters' technology/equipment requests and performs related organizational tasks. Coordinates and confirms occasional event logistics with host staff and, as applicable, with guests, attendees, and presenters.
17. Prepares reports and meeting materials. Takes and prepares meeting minutes.
18. Maintains the roster of Retirement Plan Committee members. Tracks members' tenure.
19. May represent the Plan at regional and national events and with UU professional organizations when significant participation by employers or participants warrants Plan presence.

20. 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 10 position (expected hiring range \$41,600-\$62,000 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. Our ideal candidate will have:

- Bachelor's degree or equivalent with 3+ years' experience in HR, payroll, retirement plan, customer service, membership services, or related work.
- A strong customer service and benefit compliance focus working within the regulatory and fiduciary environment.
- Excellent oral, written, and presentation skills.
- Experience with retirement plans within the not-for-profit services market is very desirable.
- Excellent judgment around sensitive and confidential issues.
- Working knowledge of typical staff and volunteer roles and responsibilities in faith communities is helpful.
- Basic familiarity with clergy compensation is a plus.
- A high degree of motivation, diligence, and integrity.
- Exceptional attention to detail and organizational skills.
- Highly proficient in video conferencing technology, Microsoft Office (Excel, Outlook, and Word), data management, 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.
- Ability and willingness to travel to Boston for in-person team meetings 3-4 times per year. May need to attend other events, including the UUA's annual General Assembly for a week each June.

* 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 Specialist" 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 staff located throughout the United States. 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.