

JOB DESCRIPTION

San Diego County Office of Education

PROGRAM MANAGER, DEFERRED COMPENSATION

Purpose Statement:

The job of Program Manager, Deferred Compensation, is done for the purpose/s of directing business programs and financial services; providing information and serving as a resource to others; achieving defined objectives by planning, evaluating, developing, implementing and maintaining services for a Deferred Compensation Program in compliance with established guidelines for Supplement Employment Retirement Program (SERP).

Diversity Statement:

Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, and being accountable for one's actions and the resulting impact.

Representative Duties:

This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties.

Distinguishing Characteristics:

This job is distinguished from similar jobs by the following characteristics: San Diego County Schools Fringe Benefits Consortium (FBC), 403(b), 457 (b), 401(a), Roth 457(b), Roth 403(b), 3121 plans, STRS, and PERS (retirement systems).

Essential Functions:

- Manages the Deferred Compensation program and vendor relationships, and oversees vendors for the purpose of providing direction and support, making recommendations, maximizing use of funds, and/or ensuring overall operations are within federal/state guidelines.
- Serves as the FBC's designated Plan Administrator under the plan document for the 403(b), 457(b), and 401(a) plans.
- Manages relationships with TPA, record-keeper, investment manager, legal counsel, auditors, and plan vendors, including contract administration, service monitoring and issue resolution.
- Assists employees (e.g. PEA's and their employees, etc.) for the purpose of providing information and general training for deferred compensation program management.

- Collaborates with internal and external personnel (e.g. benefit department coordinators, employees, agencies, STRS, and PERS, retirement groups, etc.) for the purpose of implementing and/or maintaining services and programs.
- Compiles data from a wide variety of sources (e.g. 403(b), 457(b), 401a, Roth 403(b), 3121 plans, etc.) for the purpose of analyzing issues, ensuring compliance with organization policies and procedures, and/or monitoring program components.
- Coordinates presentations of financial matters for a program Advisory Committee (e.g. FBC Deferred programs, how to implement a 401(a) for a separate class of employees, 3121 plans, Retirement Incentive Programs, etc.) for the purpose of keeping the plan advisory committee up-to-date on the program.
- Facilitates presentations, meetings, workshops, seminars, etc. (e.g. investing 101, deferred compensation enrollment, investment options, asset allocations, etc.) for the purpose of identifying needs, developing recommendations, and supporting employees.
- Maintains a variety of manual and electronic fiscal information, files and records for the purpose of providing up-to-date information regarding deferred compensation program retirement options.
- Manages assigned programs (e.g. deferred compensations, TPA relationship with all school districts and charter schools, Investment Manager, Trustee, Plan Advisory committee, 3121 program, etc.) for the purpose of achieving financial objectives, and ensuring compliance with legal, financial and federal/state requirements.
- Monitors deferred compensation programs for the purpose of ensuring all guidelines for state and federal are followed.
- Participates in meetings, workshops and seminars for the purpose of conveying and/or gathering information required to perform functions.
- Prepares and coordinates preparation of a wide variety of materials (e.g. powerpoints, fliers, seminar information, spreadsheets, reports for the Plan Advisory committee, and financial programs, etc.) for the purpose of documenting activities and issues, meeting compliance requirements, and/or providing supporting materials for requested actions.
- Presents information on financial matters (e.g. STRS, PERS, Social Security, Early retirement, Savings, 403(b), 457(b), 401a, Roth 403(b), 3121 plans, etc.) for the purpose of communicating information, gaining feedback and ensuring adherence to established guidelines.
- Researches financial topics and related legal issues (e.g. discrepancies, current legislative trends, etc.) for the purpose of evaluating compliance requirements and potential implications on district operations.

Other Functions:

- Perform other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications:

Knowledge and Abilities

KNOWLEDGE OF:

Human centered and socially conscious leadership;
Pertinent laws, codes, policies, and/or regulations;
Personnel processes;
Program planning and development;
School budgeting, policies and audit procedures;
Concepts of grammar and punctuation;
Principles of public and fund accounting and budgeting;
Principles of negotiation/arbitration.

ABILITY TO:

Promote a human-centered culture that elevates the strengths of others creating a sense of belongingness;
Practice cultural competency while working collaboratively with diverse groups and individuals;
schedule activities, meetings, and/or events;
routinely gather, collate, and/or classify data;
Independently work with others in a wide variety of circumstances;
Analyze data utilizing a variety of complex processes;
Operate equipment using a variety of standardized methods.
Ability is also required to work with a significant diversity of individuals and/or groups;
Work with data of widely varied types and/or purposes;
Independently problem solve to analyze issues and create action plans.
Adapt to changing work priorities;
Communicate with diverse groups and individuals;
Meet deadlines and schedules;
Set priorities;
Work as part of a team;
Work with detailed information/data;
Maintain confidentiality.

Working Environment:

ENVIRONMENT:

Duties are typically performed in an office setting.

PHYSICAL ABILITIES:

Must be able to hear and speak to exchange information; see to perform assigned duties; sit or stand for extended periods of time; possess dexterity of hands and fingers to operate computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files; lift light objects. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Education and Experience:

Education: Bachelor's degree in business, finance, or public administration or closely related field; and

Experience: Five (5) years of experience in deferred compensation programs and management, including experience in developing and conducting retirement-related workshops and presentations; or

Equivalency: A combination of education and/or experience equivalent to a bachelor's degree in business, finance, or public administration or closely related field and five (5) years of deferred compensation programs and management, including experience in developing and conducting retirement-related workshops and presentations.

Required Testing
N/A

Certificates, Licenses, Credentials
Valid California Driver's License

Continuing Educ./Training
N/A

Clearances
Criminal Justice Fingerprint/Background
Clearance
Physical Exam including drug screen
Tuberculosis Clearance

FLSA Status: Exempt

Salary Grade Classified Management, Grade 044

Personnel Commission Approved: 10/19/16

Revised: 06/2019, 09/2026