

**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 in compliance with established guidelines for Supplement Employment Retirement Program (SERP).

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

---

**Essential Functions**

- Analyzes a variety of financial information (e.g. Mutual Funds, Variable Annuities, Stocks, and Bonds., etc.) for the purpose of providing direction and support, making recommendations, maximizing use of funds, and/or ensuring overall operations are within federal/state guidelines.
- Assists employees (e.g. PEA's and their employees, etc.) for the purpose of providing information and general training for financial planning needs.
- Collaborates with internal and external personnel (e.g. benefit department coordinators, employees, agencies, STRS, PERS, CERS, and FERS 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), 529 plans, 401k and all IRAs, 3121 plans, etc.) for the purpose of analyzing issues, ensuring compliance with organization policies and procedures, and/or monitoring program components.
- Conducts presentations of financial matters for Administrators Investment Advisory Committee (e.g. FBC Deferred programs, how to implement a 401(a) for a separate class of employees, 3121 plans, Early Retirement Programs, etc.) for the purpose of keeping the investment advisory committee up-to-date on evaluating funds in 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 an up-to-date information regarding deferred compensation, retirement options, IRAs, tax planning, estate planning, wills, trusts, etc.
- Manages assigned programs (e.g. deferred compensations, TPA relationship with all school districts and charter schools, Trustee, Investment 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 a wide variety of materials (e.g. powerpoints, fliers, seminar information, spreadsheets, reports for the Investment 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, CERS, FERS, Social Security, Early retirement, disability Benefits, Savings & Investments, 403(b), 457(b), 401a, Roth 403(b), 529 plans, 401k and all IRASs. 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**

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

### **Job Requirements: Minimum Qualifications**

#### **Skills, Knowledge and Abilities**

SKILLS are required to perform multiple, technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: operating standard office equipment including using a variety of software applications; planning and managing projects; and preparing and maintaining accurate records; analyzing data; classifying data and/or information; conducting meetings; facilitating meetings; using pertinent software applications.

KNOWLEDGE is required to perform algebra and/or geometry; read technical information, compose a variety of documents, and/or facilitate group discussions; and analyze situations to define issues and draw conclusions. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: 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; business telephone etiquette; codes/laws/rules/regulations/policies; grammar, spelling and punctuation; practicing cultural competency while working collaboratively with diverse groups and individuals; principles of negotiation/arbitration.

ABILITY is required to schedule activities, meetings, and/or events; routinely gather, collate, and/or classify data; and use job-related equipment. Flexibility is required to independently work with others in a wide variety of circumstances; analyze data utilizing a variety of complex processes; and 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; and utilize a variety of types of job-related equipment. Independent problem solving is required to analyze issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is moderate to significant. Specific ability based competencies required to satisfactorily perform the functions of the job include: adapting to changing work priorities; communicating with diverse groups and individuals; meeting deadlines and schedules; setting priorities; working as part of a team; and working with detailed information/data; available on-call; maintaining confidentiality.

### **Responsibility**

Responsibilities include: working under limited supervision using standardized practices and/or methods; directing other persons within a department, large work unit, and/or across several small

work units; supervising the use of funds. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the organization's services.

**Working Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, and significant fine finger dexterity. Generally the job requires 70% sitting, 15% walking, and 15% standing. This job is performed in a generally clean and healthy environment.

Experience Job related experience with increasing levels of responsibility is required.

Education Bachelors degree in job-related area.

Equivalency

Required Testing

Certificates

Driver's License & Evidence of Insurability

Series 6 License preferred Series 7 License

Continuing Educ./Training

Clearances

Criminal Justice Fingerprint/Background Clearance

Drug Test

TB Screen

FLSA State: Exempt

Salary Range: Classified Management, Grade 44

**Personnel Commission Approved: October 19, 2016**