



National Council on Teacher Retirement
Executive Director Position

The National Council on Teacher Retirement (NCTR) is constituted as a nonprofit, tax-exempt, independent association under Section 501(c) (6) of the Internal Revenue Code. NCTR is dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which educators belong, and to promoting the rights and benefits of all present and future members of the systems.

NCTR membership includes 63 state, territorial, and local pension systems that serve more than 19 million active and retired teachers, non-teaching personnel, and other public employees. These systems have combined assets of more than \$2 trillion in their trust funds.

Membership in NCTR is also open to pension-related public agencies, and employee and retired employee organizations whose members belong to a state or public teacher retirement system. In addition, NCTR includes Associate Commercial Members, representing accounting, technology, actuarial, investment firms, and other organizations having an interest in retirement activities.

NCTR is governed by a ten-member Executive Committee, and is additionally staffed by a full-time Assistant Executive Director and a full-time Communications Director. NCTR also has a contracted Federal Government Relations Director. The NCTR headquarters and Assistant Executive Director are currently located in Elk Grove, CA; the Communications Director is in Baton Rouge, LA; and the Federal Government Relations Director is in Washington, D.C. The full-time Executive Director may work in a virtual office setting, but is expected to maintain frequent and regular communication with the team. The NCTR operating budget is approximately \$1.5M.

For more information about NCTR, please visit the website at www.nctr.org.

RESPONSIBILITIES

Reporting to the Executive Committee, the Executive Director is the administrative head of NCTR. The Executive Director provides leadership in planning, developing and implementing long and short-term strategies; oversight and management of the budget, ensuring appropriate business practices and accounting controls are in place; planning and organizing the Annual Conference as well as other NCTR workshops and Executive Committee meetings; and representing NCTR in official capacities with outside organizations and the media.

Essential duties include, but are not limited to, the following:

Strategic Planning and Leadership

- Participates in and coordinates the development of the NCTR strategic plan and insures execution of the plan. Development of a new 3-year plan will begin at the Annual Conference in October 2020.
- Serves as spokesperson for NCTR in coordination with the Federal Relations Director.



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Strategic Planning and Leadership (continued)

- Represents NCTR at national and local meetings and communicates NCTR policy positions on matters of retirement security and the effective governance and administration of public pension plans.
- Promotes and sustains positive and effective alliances with other stakeholder organizations.
- Works closely with member pension systems, including periodic visits when feasible.

Finance

- Presents a proposed budget to the Executive Committee in advance of the beginning of the new fiscal year.
- Annually recommends any changes to member dues, meeting fees and Conference registration fees.
- Ensures that monthly financial statements are prepared timely, reviews financial statements for validity of transactions, and distributes to the Secretary-Treasurer.
- Reviews NCTR's financial position on a monthly basis and makes periodic reports to the Executive Committee.
- Ensures that an Annual Audit is performed by an outside auditor and the Auditor prepares and submits applicable State and Federal tax returns.
- Provides financial information to the membership in accordance with the Executive Committee's policies on transparency.

Conference and Meeting Planning

- Works with the Assistant Executive Director to secure sites for all NCTR meetings, negotiate terms favorable to NCTR, and enter into necessary contracts.
- Facilitates the planning of the agenda for the Annual Conference with the President-Elect, secures speakers, and determines promotional activity related to the convention.
- Plans agendas for all other NCTR meetings, including Executive Committee meetings, the Directors' meeting, the Trustee Workshop, and other committee meetings and workshops.
- Works with the Assistant Executive Director on all logistics for the Annual Conference and all other meetings and workshops, including planning for off-site functions, audio visual equipment needs, and meal functions.
- Promotes and secures appropriate sponsorships to supplement registration fees for the Annual Conference, other meetings and workshops.

Operations

- Coordinates the annual membership renewal process and seeks to grow membership by recruitment of new members.



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Operations (continued)

- Supervises the NCTR staff and coordinates activities of third parties such as the Federal Government Relations Director.
- Manages the implementation of the Annual Conference and ensures that a record of the meeting is made available on the NCTR website.
- Assists the board President in the appointment of committee members; works with committee chairs to prepare for committee meetings and ensures there is a record of such meetings.
- As special projects and/or initiatives are identified by the Executive Committee, the Executive Director provides necessary leadership and management of such projects.

Communications

- Serves as a spokesperson for NCTR and responds to inquiries from member systems, individual members, the press and other organizations regarding issues pertinent to pension plans; builds a “presence” for NCTR with the media, legislative bodies and other appropriate audiences.
- Reviews the NCTR website to ensure that it provides information that is topical and helpful to member systems, individual members and other organizations.
- Maintains regular communication with members to provide important information about the organization.
- Represents NCTR in various venues such as forums, meetings of the National Association of State Retirement Administrators, the Council of Institutional Investors, Government Finance Officers Association, and the National Institute on Retirement Security (where the incumbent currently serves on the board), along with other trade groups where it is important for NCTR to have a presence.
- In conjunction with the Executive Committee, develops and implements a comprehensive communications plan.

EDUCATION AND EXPERIENCE

- Bachelor's degree from an accredited college or university; advanced degree or industry certification is desirable. Substantial relevant experience may be substituted for a degree in limited circumstances.
- Ten years of experience in an executive role at a public pension fund or comparable management experience in an entity with common interests to the public pension industry.
- Direct experience supervising staff as well as experience developing and managing a budget.
- Experience reporting to or working closely with a Board.
- Formal experience as a spokesperson preferred, including experience with the media.
- Experience developing and maintaining appropriate relations with stakeholders, constituents, and other forms of public outreach.



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EDUCATION AND EXPERIENCE (continued)

- Knowledge of all types of retirement systems (defined benefit, defined contribution and hybrid models).
- Knowledge of public administration at state, local and federal levels is desirable.

PERSONAL CHARACTERISTICS

- Commitment to and passion for public pension plans and the mission of NCTR.
- Energetic and focused; self-disciplined to work effectively in a virtual setting while holding self, staff and Executive Committee accountable for achieving defined goals and objectives.
- Excellent communication skills, including speaking, writing and listening.
- Strong interpersonal skills; comfortable and able to communicate effectively with NCTR's various constituents and audiences.
- Strong understanding of, and personal commitment to, fiduciary duty.
- Desire and ability to identify and "sell" NCTR to potential new members.
- Willingness and ability to collaborate with other associations on common issues.
- Credibility within the public pension community.

COMPENSATION

Compensation will correspond to the experience and credentials of the selected candidate, in line with compensation for an organization of NCTR's size and budget. NCTR will provide health insurance and a percentage of the base salary to a SEP-IRA plan for the Executive Director.

APPLICATION PROCESS

For consideration, please submit your cover letter, resume, and questionnaire to Robyn Wheeler at rwheeler@nctr.org. Referrals and applications will be held in confidence. Review of applications will begin immediately and will continue until the position is filled.

NON-DISCRIMINATION

NCTR is committed to being an equal opportunity employer for all individuals, regardless of age, race, gender, gender identity or expression, creed, national origin, disability, veteran status or any other protected category pursuant to applicable federal, state or local law.



**National Council on Teacher Retirement
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(Please number and provide answers in a separate document)

- 1.** What is your current assessment of public pension plans and what changes do you see in the next five years for public pension plans?

- 2.** Membership is a key issue in any non-profit association. How would you approach Membership development for NCTR?

- 3.** It is anticipated that the NCTR Executive Director will have a “virtual office” for at least the first year, and that the Business Operation will remain in Elk Grove, CA. What resources would you need to function in such an environment?

- 4.** What is your management style, and what specific approach and practices would you utilize to manage the NCTR remote team?

- 5.** NCTR’s Annual Conference is a major revenue source for the organization. There are numerous pension conferences in the country sponsored by a variety of organizations. How can NCTR differentiate its Annual Conference from other conferences?

- 6.** The Communications function is ever changing in this electronic world (webinars, social media, on-line streaming, etc.). What challenges and opportunities does this present for NCTR, and what experience do you have in this area?