



National Council on Teacher Retirement Executive Director Position Posting

BACKGROUND

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 68 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 providing services to NCTR member systems or having an interest in public pensions.

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



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

Strategic Planning and Leadership

- Coordinates updates to the NCTR strategic plan and annual business objectives, and insures implementation.
- Serves as spokesperson for NCTR in coordination with the Federal Relations Director.
- Represents NCTR at national 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.

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 and securing speakers and sponsors for the Annual Conference with the President-Elect, NCTR staff, Government Relations Director.
- Facilitates the planning of the agendas and securing speakers and sponsors for all other NCTR meetings and workshops with the NCTR staff, Government Relations Director and sub-committees of the Executive Committee. Meetings including Executive Committee meetings, annual Directors' meeting, annual Trustee Workshop, and other staff workshops.
- Ensures that all logistics for the Annual Conference and all other meetings and workshops, including planning for off-site functions, audio visual equipment needs, technology needs and meal functions are successfully managed by the assigned NCTR staff.



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Operations

- Oversees the annual membership renewal process; identifies and implements, along with NCTR team, opportunities to grow membership through recruitment of new members.
- Supervises the NCTR staff and coordinates activities of the Federal Government Relations Director and any other contractors, promoting teamwork.
- Conducts regular team meetings with the staff and contractor(s), as well as the NCTR officers.
- 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.
- Ensures 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 and/or industry certification is desirable. Ten years of experience in an executive role at a public pension system or comparable management experience in an entity with common interests to the public pension industry.
- Direct experience managing remote staff and building team cohesion.
- Direct experience developing and managing a budget.
- Experience reporting to or working closely with a Board of Directors.
- 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 plans (defined benefit, defined contribution and hybrid models).
- Proficient in the use of technology necessary for position, including but not limited to MS Office and virtual meeting platforms.

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.

WORK SCHEDULE

The NCTR Executive Director is a part-time (50%) position. The hours fluctuate throughout the year based on the organization's calendar of events. The Executive Director must be flexible and adapt their schedule to work more hours during peak periods and fewer hours in off-peak periods, yet must be engaged with the NCTR team throughout the year.

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 no later than January 31, 2021. 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
Executive Director Applicant Questionnaire**

(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” 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?