

Retirement Program Administrator



City of Phoenix



This is a tremendous opportunity for a strong, mission-driven executive to lead with accountability, manage a large and sophisticated system, and enhance the retirement experience for Phoenix employees and retirees!

THE CITY

Over 1.7 million people call Phoenix home, where sunshine and opportunities are endless! Commonly known as the “Valley of the Sun”, Phoenix is the 5th largest city in the United States and provides a rich culture and an abundance of attractions for both residents and visitors from museums, nature parks, and restaurants to a vast network of arts, entertainment, sports, recreational and educational amenities.

Phoenix and the surrounding areas are home to several major professional sports teams, including the Arizona Diamondbacks (MLB), Phoenix Suns (NBA), Phoenix Rising and Phoenix Mercury (WNBA), Arizona Cardinals (NFL), and the site for the Spring Training MLB Cactus League. Phoenix also has one of the fastest growing job markets and is emerging in a new economy with strength in advanced manufacturing, aerospace and defense, bioscience & healthcare, computer sciences and entrepreneurial activity. Education continues to be a primary focus as well with high-quality public schools, community colleges and universities.

With its strategic location within hours of multiple leisure destinations, Phoenix offers outstanding weather and a vibrant lifestyle, making it a great place to do business, but an even better place to live.

THE ORGANIZATION

The City of Phoenix is a full-service city with the largest council-manager form of government in the United States, with over 16,000 city employees, including seven employee unions and associations, and a \$7.8 billion annual budget. The Phoenix City Council is comprised of a Mayor and eight Council members. Each council member is elected by the people from a represented council district for a four-year term. The Mayor is elected at-large. The City Manager is appointed by the Mayor and City Council and is responsible for the city’s day-to-day management and operations including overseeing more than 30 departments and managing the finances and budget of the City of Phoenix.

The vision for the City is to improve the quality of life through efficient delivery of outstanding public services. The vision statement, “We will make Phoenix a great place to live, work, and visit, by fostering a dynamic and sustainable environment with exceptional public services,” continues to define and stimulate the City’s growth and development. The City places a high value on being employee-friendly by striving to be a local market leader for employee compensation and benefits, honoring all cultures and lifestyles, leading the way to be innovative and progressive, and creating a workplace that focuses on customer service excellence both internally and externally to become an “employer of choice”.



BUILDING THE PHOENIX TEAM

The City Manager has identified the following goals for the City organization in 2026:

- > **Build Leadership Capacity for the Next Decade**
- > **Improve Customer Service**
- > **Continue Financial Excellence**
- > **Enhance Economic Development, Water Security and Competitiveness**
- > **Further Continuous Improvement in Public Safety**
- > **Improve Housing Affordability and Support Safety for Neighborhoods and Residents**
- > **Preserve and Expand a Safer Transportation Network**

To learn more about the City of Phoenix, visit:
<https://www.phoenix.gov/>

ABOUT THE RETIREMENT OFFICE



The Retirement Office serves several vital roles within the City, including COPERS, a robust Defined Contribution/Deferred Compensation Plans (DCP), a Post Employment Health Plan (a VEBA Trust) (PEHP), and performs administrative duties on behalf of the Arizona Public Safety Personnel Retirement System. The City of Phoenix Employees' Retirement System (COPERS) is a single-employer, defined benefit pension plan established by the City Charter. Its purpose is to provide retirement, disability retirement and survivor benefits for its members. COPERS is a \$4.3 billion public retirement system for non-uniformed City of Phoenix employees. COPERS has an active membership of approximately 9,600 employees and retired membership of approximately 9,000.

The DCP and PEHP plans provide alternative retirement and long-term health savings accounts for over 30,000 current and past employees, and their beneficiaries. Combined, the DCP and PEHP plans manage over \$4 billion on additional retirement savings. The PEHP is the largest such government plan in the United States.

Members are full-time employees on a work schedule which consists of the number of full-time hours per week designated for the class of employment for the employees' classification and which work schedule is intended to be continuous over a period of twelve months. All full-time classified civil service employees and full-time appointive officials of the City with the exception of sworn police and fire fighters are required, as a condition of employment, to contribute to COPERS.

The general administration, management and operation of the plans managed by this position are vested in various Boards.

COPERS

» A nine-member board consisting of three elected employee members, four ex-officio members, a citizen member and a retiree member.

DCP / PEHP

» A nine-member board consisting of three employees appointed by the City Council, one non-public safety member of the coalition of Phoenix City Unions, one employee who is a member of the International Association of Firefighters Local 493, one employee who is either a member of the Phoenix Law Enforcement Association or Phoenix Police Sergeants and Lieutenants Association, two members appointed by the City Manager, one retired member, the Retirement Programs Administrator, and the City Manager or their designee.

Phoenix Fire Local Pension Board *(a function of the Arizona Public Safety Personnel Retirement System)*

» A five-member board consisting of two elected members, the chairperson of the Phoenix Civil Service Board, one citizen member, and the Mayor or their appointee.

Phoenix Police Local Pension Board *(a function of the Arizona Public Safety Personnel Retirement System)*

» A five-member board consisting of two elected members, the chairperson of the Phoenix Civil Service Board, one citizen member, and the Mayor or their appointee.



POSITION OVERVIEW

The Retirement Program Administrator has overall responsibility for the leadership, administration, and financial stewardship of COPERS and the DCP/PEHP Plans. This role oversees all aspects of retirement system operations, including office administration and budgeting, comprehensive plan administration, and the design, interpretation, and communication of retirement benefits to members and stakeholders. Operating under the general direction of the City Manager, the Administrator serves as the primary staff advisor to the board listed above. This role will oversee an annual budget of \$2.5 million and 22 hardworking and dedicated employees.

This position demands the expert application of retirement system administration principles, including finance, accounting, budgeting, investments, cash management, asset allocation, actuarial funding, and statistical analysis to ensure the long-term financial integrity, sustainability, and regulatory compliance of multiple retirement plans. The Administrator is responsible for preparing and overseeing financial, governmental, and disclosure reporting; coordinating actuarial valuations and funding strategies; establishing and implementing administrative policies and procedures; and leading the procurement and negotiation of professional services through the competitive RFP process.

In addition, the Retirement Program Administrator directs and integrates sophisticated technology systems supporting personnel, payroll, finance, pension administration, and custodial functions, while ensuring compliance with applicable laws, rules, and regulations. The role carries broad supervisory authority, providing leadership to staff and delivering clear, accurate, and effective written and oral communications. The Administrator collaborates closely with retirement board members, department directors, City Council members, financial advisors, paying agents, and peer government retirement organizations to advance sound governance, informed decision-making, and exceptional service to plan members.

Additional Responsibilities for the Retirement Program Administrator:

- » Supervises administrative and support staff;
- » Administers the City of Phoenix Retirement System Programs for Elected, General, Police, and Firefighter employees under the general direction of three Boards;
- » Manages and participates in legal, fiscal and procedural monitoring activities;
- » Answers questions about provisions of applicable retirement and tax laws and regulations;
- » Maintains statistical and demographic information to facilitate the work of the actuary in making annual valuations of the system;
- » Reviews and evaluates actuarial, financial and other consultant report studies and makes recommendations to the Boards;
- » Prepares material for consideration of the Board, attends meetings of the Boards and maintains technical minutes of the meetings;
- » Responds to all audit closings regarding the retirement programs and office administration;
- » Prepares statistical and narrative reports and printed materials;
- » Evaluates adequacy of current procedures, programs and controls and implements changes;
- » Evaluates consultant investment program recommendations and initiates, evaluates and implements retirement plan designs;
- » Participates in cash management analysis and investment;
- » Evaluates investment performance and master custodian activities;
- » Participates in the evaluation and determination of cases before the Disability Assessment Committee.
- » Maintains regular and reliable attendance;
- » Demonstrates superior seamless customer service, integrity, and commitment to innovation, efficiency, and fiscally responsible activity.

For more information on the City of Phoenix Retirement Office, please visit:

<https://www.phoenix.gov/administration/departments/retirement.html>

CHARACTERISTICS OF THE IDEAL CANDIDATE

The Retirement Program Administrator will be a highly ethical, trusted leader who demonstrates full ownership of the City's retirement system and the ability to operate effectively within the largest City Manager-run organization in the country. This individual must be a transparent, proactive, and collaborative partner who listens intentionally, communicates clearly, and builds credibility across all levels of the organization.

The successful candidate will possess deep knowledge of public-sector finance, budgeting, and city governance—or demonstrate the ability to rapidly master complex pension systems and city financial structures. A proven record of fiduciary stewardship, sound financial decision-making, and the effective use of accounting, investment, and actuarial processes is essential to ensuring long-term sustainability and public trust.

This role requires demonstrated success working with retirement boards, city leadership, labor unions, and diverse employee groups, as well as managing global external vendors. The Administrator must showcase strong political acumen, consensus-building skills, and emotional intelligence to navigate competing priorities, public scrutiny, and high-stakes decision-making.

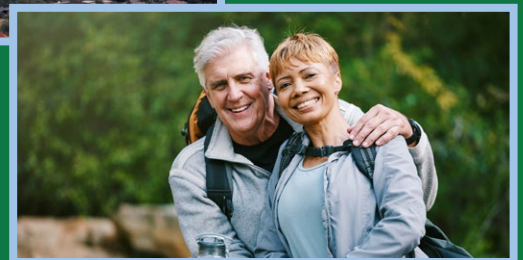
A key competency is the ability to assess and modernize retirement benefits—evaluating whether the City is meeting the evolving needs of all employee groups—while researching innovative solutions and best practices without compromising fiduciary responsibility. The ideal candidate brings experience in pension or government benefits administration and a customer-service mindset that prioritizes member trust and engagement.

As a people-centered leader, the Retirement Program Administrator will cultivate a high-performing, service-driven team through empowerment, accountability, and clear expectations. Exceptional presentation skills, executive presence, and the ability to represent COPERS with confidence and integrity are critical.

Above all, Phoenix seeks a principled financial steward with a clear record of success, pride in ownership of the retirement system, and an unwavering commitment to transparency, accountability, and the long-term success of COPERS and its members.

QUALIFICATIONS

- » Bachelor's Degree from an accredited college or university with major coursework in business administration, accounting, finance or related field.
- » A minimum of six (6) years of experience in an administrative level role, including three years' experience in a supervisory capacity.
- » Preferred experience in public or private retirement or benefit program administration.
- » Other combinations of experience and education that meet the minimum requirements may be substituted.



COMPENSATION AND BENEFITS

Salary is up to \$207,979 annually and will be commensurate with the qualifications and experience of the successful candidate. The City contributes 9% of salary into a 401(a) plan with no matching required. \$6,000/annual car allowance and \$1,440/annual cell phone allowance.

The selected candidate will be required to reside within Phoenix city limits within 24 months after the date of hire.

A comprehensive Executive benefits package is offered which includes:

Traditional pension with employer and employee contributions; choice of medical HMO, PPO, HDHP/HSA plans; wellness incentive of up to \$720 annually; dental; vision; life insurance; long-term disability; medical enrollment includes a monthly \$150 City contribution to a Post-Employment Health Plan; bus/light rail pass; tuition reimbursement; paid time off includes 13.5 paid holidays, 12 vacation days, 6 personal days, and 15 sick days.

For more details, visit: <https://www.phoenix.gov/hrsite/Benefit%20Category/010.pdf>

APPLICATION PROCESS AND RECRUITMENT SCHEDULE

To be considered for this exceptional career opportunity, submit your resume, cover letter, and a list of six work-related references (who will not be contacted without prior notice) by **Friday, May 29, 2026**. Please submit your materials to: <https://www.cpsr.us/recruitment/2598>.

For additional information about this position please contact:

CPS HR CONSULTING
Your Trusted HR Advisor For 40 Years

KYLIE WILSON

Principal Consultant

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Website: www.cpsr.us

Candidates deemed to have the most relevant backgrounds will be invited to participate in a preliminary screening interview with the consultant. Those individuals determined to be best suited for this role will be invited to participate further in two rounds of interviews with the final round being held in-person. ***This recruitment and any interview process resulting from this recruitment may be used to fill any related current or future vacancies.***

