

New Mexico Annual Conference of the United Methodist Church (NMAC UMC)
Board of Pension and Health Benefits (BoPHB)

Job Title: Conference Benefits Officer

Reports To: Chairperson of the New Mexico Board of Pension and Health Benefits

Position Overview: The Conference Benefits Officer (CBO) of the Board of Pensions and Health Benefits (BoPHB) administers, manages, bills, reconciles and communicates our Wespath offered, company-sponsored health insurance, pension and retirement, as well as BoPHB wellness plans and grants. Key responsibilities include guiding clergy, lay employees, and retirees through enrollment, resolving complex claims issues, ensuring regulatory compliance (e.g., FMLA, COBRA), managing Wespath retirement accounts, HealthFlex, VIA Benefits, and other vendor relationships, and educating covered lives and appropriate local church representatives on benefit obligations and options. The CBO is responsible for account reconciliations of the various plans and programs on an ongoing basis. Must be able to travel several times per year and provide support for the Board and Officer's meetings. The role requires high autonomy and self-direction.

Key Responsibilities and Duties:

- **Benefits Administration:** Processing enrollment and termination for medical, dental, vision, and disability insurance and pension and retirement plans, as well as grants available. Ensuring that local churches and participants are billed for appropriate amounts for each covered life through database. Tracking receipts from churches and individuals. Forwarding payments to Wespath, HealthFlex, and VIA Benefits. Providing any support necessary for the BoPHB Grants Committee to do its work. Creates and publishes benefits communications including all print, email, Conference newsletter and website communications). Promotes and coordinates plan benefits, retirement, and HealthFlex seminars or workshops with NMC Clergy and Local Church leadership.
- **Covered Individual and Local Church Support:** Acting as the primary contact for inquiries regarding plan options, coverage, and claims, particularly during onboarding, open enrollment and time of change in lives covered as well as through times of retirement, disability/incapacity and death. Helping establish and monitor the HRA funding for those enrolled in VIA Benefits. Stays current on all plan changes and funding issues to help ensure conference's financial long-term viability.
- **Compliance:** Ensuring all benefits programs adhere to state and federal laws, such as the Family and Medical Leave Act (FMLA) and COBRA.
- **Vendor Management:** Acting as a liaison between the organization and Wespath, HealthFlex, VIA Benefits and others to resolve issues and optimize plan offerings.
- **Record/Report Maintenance:** Maintaining accurate, confidential records and database of active and retired clergy, family and employee insurance and pension information and managing payroll deductions. Produce end of month and end of year reports for all

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accounts and necessary reports for NM BoPHB, Wespah, and the Annual Conference. Maintaining accurate records of addition funds in BoPHB's various accounts. Notifying clergy, The NMC Bishop & Cabinet and the BoPHB Executive Committee of arrearages to the billing plan, prior to any loss in benefits and coverage.

- **Supervising:** Work with the BoPHB Clerical Support Employee who assists the CBO in gathering and entering information into our database for all clergy compensation forms.
- **Advising:** Conducting orientation sessions for new hires and exit interviews for departing or retiring clergy and employees regarding benefits, including retirement options and corresponding with various local church officials to ensure accurate forms and funding streams are in place.
- **BoPHB Board responsibilities:** Maintain all files, minutes, reports and databases in an organized and usable fashion. Orients new Board members. Coordinate and provide for all aspects of Board meetings including agenda, reports, site determination, meals, hotels, zoom link & hosting, reimbursement forms, minutes and updates for Board members accordingly. Completes annual State of New Mexico nonprofit corporate report; submitting required fees and updated information to keep current.
- **NMAC Planning Team for Annual Conference Sessions:** Coordinate the team all aspects of an annual retirement luncheon sponsored by BoPHB during Annual Conference Sessions. Assist the planning team who provides an annual conference memorial service.

Required Skills and Qualifications:

- **Knowledge:** In-depth understanding of insurance and pension regulations, terminology, and HR practices.
- **Communication:** Strong interpersonal skills to explain complex information clearly and with kindness to employed and retired clergy, lay employees, designated family members and appropriate local church representatives, the BoPHB, the Cabinet and staff of the NMAC, Wespah Personnel, and vendor staff.
- **Self-Direction:** The ability to work independently and take initiative.
- **Technical:** Proficiency in human resources information systems (HRIS), payroll systems, Microsoft Office and Zoom meeting skills.
- **Education and Experience:** Requires a bachelor's degree in human resources, health insurance, business, or a related field, with 2+ years of experience in benefits administration and proficiency in HRIS software, Microsoft Word and Zoom.

NOTE: This job description is not intended to be all-inclusive. Employee may perform other related duties as needed to meet the ongoing needs of the organization.