



Canterbury Consulting

Job Posting — Human Resources Manager

About Canterbury Consulting:

Canterbury Consulting is an independent investment advisory firm based in Newport Beach, CA with 65+ employees. Canterbury provides consulting services to tax-exempt organizations, including community foundations, educational endowments, religious organizations, arts and cultural foundations and health care organizations, as well as family offices.

Founded in 1988, the firm designs and manages custom investment programs aligned with each client's goals. Canterbury acts as the investment office for its diverse clients and provides objective investment advice, asset allocation, manager selection, risk management, implementation, and performance measurement.

Canterbury Consulting strives to deliver performance and service that exceeds the needs and expectations of its clients. Named as one of the Best Places to Work by the Orange County Business Journal in 2023, 2022, 2021, 2020, and 2015. Canterbury Consulting was also recognized in the nationwide survey by Pensions and Investments magazine as one of the Best Places to Work in Money Management in 2023, 2022, 2021 and 2020.

Job Summary:

Administers policies relating to all phases of human resources activity by performing the following duties.

Essential Duties and Responsibilities:

- Maintains knowledge of legal requirements and government reporting regulations affecting human resources functions and ensures policies, procedures, and reporting are in compliance.
- Manages the recruiting process to fill vacant positions. Coordinates with hiring managers to schedule interviews and conduct pre-employment screening.
- Plans and conducts new employee orientation to foster positive attitude toward company goals.
- Evaluates insurance plans on an annual basis. Works with brokers for best and cost effective coverage.
- Keeps records of benefits plan participation such as insurance and pension plans, personnel transactions such as hires, promotions, transfers, performance reviews, and terminations, and employee statistics for government reporting.
- Trains management in interviewing, hiring, terminations, promotions, performance review, safety, and anti-harassment.
- Advises management team in appropriate resolution of employee relations issues.
- Responds to inquiries regarding company policies, procedures, and programs.
- Administers performance review program to ensure effectiveness, compliance, and equity within organization.
- Administers benefits programs such as life, health, dental and disability insurances, pension plans, vacation, sick leave, leave of absence, COBRA and employee assistance.



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- Administers Retirement plan.
- Develops and manages employee development programs.
- Oversees office/space management.
- Works closely with Accounting in integrating employee benefits into the payroll process.
- In coordination with outside resources; maintains employee handbook, manages HR policies, and addresses specific employee issues.
- Investigates accidents and prepares reports for insurance carrier.
- Conducts wage surveys within labor market to determine competitive wage rate.
- Prepares employee separation notices and related documentation, and conducts exit interviews.
- Other duties as assigned and/or necessary.

Supervisory Responsibilities

Supervisory duties are required. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

Competencies:

- **Problem Solving** - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Works well in group problem solving situations; Uses reason even when dealing with emotional topics.
- **Project Management** - Develops project plans; Coordinates projects; Communicates changes and progress; Completes projects on time and budget; Manages project team activities.
- **Customer Service** - Manages difficult or emotional situations; Responds promptly to others' needs; Solicits feedback to improve service; Responds to requests for service and assistance; Meets commitments.
- **Interpersonal Skills** - Focuses on solving conflict, not blaming; Maintains confidentiality; Listens to others without interrupting; Keeps emotions under control; Remains open to others' ideas and tries new things.
- **Oral Communication** - Speaks clearly and persuasively in positive or negative situations; Listens and gets clarification; Responds well to questions; Demonstrates group presentation skills; Participates in meetings.
- **Visionary Leadership** - Displays passion and optimism; Inspires respect and trust; Mobilizes others to fulfill the vision; Provides vision and inspiration to peers and subordinates.
- **Managing People** - Takes responsibility for subordinates' activities; Makes self-available to staff; Provides regular performance feedback; Develops subordinates' skills and encourages growth; Solicits and applies customer feedback (internal and external); Fosters quality focus in others; Improves processes, products and services.
- **Quality Management** - Looks for ways to improve and promote quality; Demonstrates accuracy and



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thoroughness.

- Judgment - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.
- Dependability - Follows instructions, responds to management direction; Takes responsibility for own actions; Keeps commitments.

Qualifications:

Education and/or Experience:

Bachelor's degree from four-year College or university; three to five years related experience and/or training; or equivalent combination of education and experience. Certification (SPHR or PHR) preferred. Experience in a law firm, consulting firm, or other business with a partner and/or variable compensation structure preferred.

Language Skills:

Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals. Ability to write routine reports and correspondence. Ability to speak effectively in front of large groups.

Salary Range: \$120,000- \$150,000

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