

## CITY OF BRADFORD METROPOLITAN DISTRICT COUNCIL JOB PROFILE

<b>DEPARTMENT: CX</b>	<b>SERVICE GROUP: WYPF</b>
<b>POST TITLE: Pensions Officer</b>	<b>REPORTS TO: Team Manager</b>
<b>GRADE: Band 5/8</b>	<b>SAP POSITION NUMBER :</b>

The following information is furnished to help Council staff and those people considering joining the City of Bradford Metropolitan District Council to understand and appreciate the general work content of their post and the role they are to play in the organisation. The duties and responsibilities highlighted in this Job Profile are indicative and may vary over time. Post holders are expected to undertake other duties and responsibilities relevant to the nature, level and scope of the post and the grade has been established on this basis.

For posts where employees speak directly to members of the Public the post holder is required to demonstrate their ability to speak fluently in English.

As a candidate you will be expected to demonstrate your ability to meet the special knowledge, experience and qualifications required for the role by providing evidence in the application form for the purpose of shortlisting. Applicants with disabilities are only required to meet the essential special knowledge requirements shown by a cross in the end column of this section.

The employee competencies are the minimum standard of behaviour expected by the Council of all its employees and the management competencies outlined are those relevant for a post operating at this level within our organisation.

Both sets of competencies will be used at interview stage and will not be used for short listing purposes. **Please see the separate guidance information on how to complete the form located on Bradnet.**

### **Key Purpose of Post:**

To provide pension administration services and payroll services for the Local Government and Fire Pension Schemes administered by WYPF covering more than 800 employers under the umbrella of numerous pension fund clients (4 LGPS + 16 Fire Scheme) and in excess of 400,000 members across the UK, accounting for annual pensions payroll in excess of £750 million. The role of Pensions Officers is to:

1. Maintain accurate and up to date member records on the pension administration system (UPM) by liaising with members, employers, finance and other pension schemes, AVC providers to collate and correct financial information and use HMRC website for pension data.
2. Ensure the timely provision of information to active, deferred and pensioner members, employers and third parties such as Independent Financial Advisors and other pension schemes by responding promptly to queries, at all times operating with appropriate financial discipline, confidentiality and within GDPR policies.
3. Assess entitlement in line with Local Government Pension Scheme (LGPS) and Fire Pension Scheme regulations and undertake benefit calculations, including the payment of benefits, using payroll processes to ensure statutory deadlines and inhouse Key Performance Indicators are met.
4. Assist Senior Pensions Officers (SPOs) in carrying out the day to day operation of the team by monitoring and prioritising urgent cases and providing training, help and support to colleagues.

**Main Responsibilities of Post:**

**Level 1- (Band 5/6) - Principal Duties**

**At this level Pension Officers are required to**

1. Develop and apply specialist knowledge of the LGPS and Fire Pension Scheme regulations and associated legislation such as HMRC taxation rules, Financial Conduct Authority guidelines to enable delivery of the pension service to active, deferred and pensioner members in the schemes administered by WYPF.
2. Understand WYPF documentation and working procedures, navigate the pension administration and workflow systems (UPM) and verify electronically scanned documents against records and the processes.
3. Develop customer service skills and an understanding of the requirements of the different types of membership (active, deferred and pensioner) and deal with them in a courteous and professional manner at all times.
4. Understand the principles and requirements of the General Data Protection Regulations and apply these to the handling of confidential information regarding scheme members and employers, on a daily basis.
5. Deal with and write a broad range of correspondence, requests and queries, including personal visits and telephone queries from scheme members, from employers and third parties, confidently and competently with minimal supervision.

**Level 2 – (Band 7) - Principal Duties – in addition to above**

6. Determine the accuracy and validity of incoming financial data, documents or requests, which may not be readily apparent. For example, reconciling data received from employers to the data held on record before undertaking calculations to ensure a high standard of accuracy whilst working to tight deadlines. Interrogating external databases to keep pension records up to date. For example NI database, mortality screening and tracing services.
7. Manage own allocated workload, prioritising cases, undertaking other urgent work whilst working to strict deadlines, with a minimum of supervision.
8. Assist SPOs to investigate, validate and correct errors and undertake complex calculations using Excel spreadsheets and manual calculations to improve own knowledge and ability.
9. Provide technical support and training to fellow Pension Officers including new colleagues in the team as directed by SPOs or Team Manager.
10. Responsible for the correct application of WYPF's Quality system and identify any service improvements to SPOs or Team Manager.

**Level 3 – (Band 8) - Principal Duties – in addition to above**

11. Promote continuous improvement by exploring ways of improving Service Centre processes, procedures and documents by forwarding suggestions and liaising with WYPF ICT & UPM Team in implementing system changes.
12. Assist the Team Manager to identify and assess own personal development requirements through active participation in performance appraisals and progression scheme reviews.
13. Assist in the development and implementation of new working practices and technologies in line with changing service needs and changing legislation and participate in project group discussions to improve service provision, working practices and efficiencies.
14. Undertake the peer checking of cases to assist SPOs and develop these skills for future progression.
15. Deputise for SPOs.



**Competency Based Job Profile Band 5-8 (June 2019)**

customers, dealing with correspondence, queries and requests in a timely and accurate manner.	
Uses organisational skills to manage own workload, exercising good judgement and initiative to prioritise work, work to strict deadline and be responsible for own service provision.	X
Experience of training and mentoring of colleagues	
A working knowledge of pensions administration or payroll systems	
<b>Relevant experience requirement: Will be used for shortlisting</b>	
<p><b><u>Level 1 – (Band 5/6)</u></b></p> <p>Recent experience of interacting with the public. Experience of teamwork. Experience of pension scheme or payroll administration, or office work would be desirable but not essential.</p>	
<p><b><u>Level 2 – (Band 7)</u></b></p> <p>As above, but 2 years experience of pension scheme and/or payroll administration. Experience of training and mentoring staff.</p>	
<p><b><u>Level 3 – (Band 8)</u></b></p> <p>As above, but 3 years experience of pension scheme and/or payroll administration. At least one years recent and relevant experience of training, monitoring and supervising staff.</p>	
<b>Relevant professional qualifications requirement: Will be used for shortlisting</b>	
<b><u>For commencement at Level 1 - (Band 5/6) :</u></b>	
5 GCSE Grade C or above (Including English & Maths), or equivalent qualifications.	
<b><u>For commencement at Level 2 –(Band 7) :</u></b>	
5 GCSE Grade C or above (Including English & Maths), or equivalent qualifications.	
<b><u>At Level 3 – (Band 8):</u></b>	
5 GCSE Grade C or above (Including English & Maths), or equivalent qualifications.	
Must have completed the Certificate in Pensions Administration (CPA) qualification or be currently studying for the CPA qualification.	
<b>Core Employee competencies to be used at the interview stage.</b>	
<b>Carries Out Performance Management</b>	
Covers the employee's capacity to manage their workload and carry out a number of specific tasks accurately and to a high standard.	
<b>Communicates Effectively</b>	
Covers a range of spoken and written communication skills required as a regular feature of the job. It includes exchanging information/building relationships; giving advice and guidance;	

counselling, negotiating and persuading and handling private, confidential and sensitive information.		
<b>Carries Out Effective Decision Making</b>		
Covers a range of thinking skills required for taking initiative and independent actions within the scope of the job. It includes planning and organising, self effectiveness and any requirements to quality check work.		
<b>Undertakes Structured Problem Solving Activity</b>		
Covers a range of analytical skills required for gathering, collating and analysing the facts needed to solve problems. It includes creative and critical thinking; developing practical solutions; applying problem solving strategies and managing interpersonal relationships.		
<b>Operates with Dignity and Respect</b>		
Covers promoting equality, treating all people fairly and with dignity and respect, maintains impartiality/fairness with all people, is aware of the barriers people face.		
<b>Working Conditions:</b>		
Must be able to perform all duties and tasks with reasonable adjustment, where appropriate, in accordance with the Equality Act 2010 in relation to Disability Provisions.		
<b>Special Conditions:</b>		
You will be informed if there is a requirement for the post to have recruitment checks such as DBS, Warner Process.		
<b>Compiled by: Grace Kitchen</b>	<b>Grade Assessment Date: July 2020</b>	<b>Post Grade: Band 5/8</b>
<b>Date: March 2022</b>		