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| Service and job specific context statement | |
| **Directorate:** | Central Services |
| **Service:** | Pensions |
| **Post title:** | Pension Administration Officer |
| **Grade:** | F - G Career Grade |
| **Responsible to:** | Pension Administration Team Leader |
| **Staff managed:** | None |
| **Date of issue:** | December 2018 |
| **Job family:** | **P&T - Professional & Technical** |

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| Job context |
| North Yorkshire County Council is the administering authority for the North Yorkshire Pension Fund (NYPF) and as such employs a team of staff to undertake the administration and running of the NYPF on its behalf. The Fund is open to all staff working in local government and for other organisations that have chosen to participate in it. The Fund currently has over 100 participating organisations.  The continued success and development of the service is dependent upon delivering a high quality service which meets the needs of customers. To do this we need to ensure the Fund is administered in accordance with overriding regulations and the correct benefits are paid to the correct beneficiaries in a prompt and efficient manner.  This role is based at County Hall and involves spoken communications so a confident use of the English language is required. |
| Job specifics |
| * Calculate member benefits. * Deal with member enquiries in writing, by email, by phone and in person. * Work closely with others to identify and recommend process improvements to improve accuracy and efficiency. * Ensure information provided to members is accurate and up to date. * Ensure that accurate up to date records are maintained for Fund members.   Progression from Grade F to G will be determined by:   * Availability of work at that level. * Satisfactory performance of tasks set and targets achieved through the annual appraisal process. * Progression in personal development with officers being required to study for an appropriate professional pensions qualification or through gaining equivalent knowledge and skills through experience.   Officers will have demonstrated the ability to:   * + Manage own daily work load within pre-agreed timescales and monitor workloads and targets for specified team members   + Perform to a consistently high standard   + Support long term developments in the section and be involved in corporate initiatives and focus groups   + Perform and check the full range of benefit calculations   + Exercise initiative and discretion in day to day problem solving   + Work with minimal supervision   + Understand the wider principles of all types of occupational pension scheme and be able to apply them   + Provide positive mentoring to other team members   + Lead by example, taking responsibility for emerging issues as appropriate   + Participate in the effective running of the team, including assisting team members to meet team targets and to encourage team working   + Identify where tasks are appropriately bespoke or complex to be passed to a more senior member of the team   + Contribute proactively to specific projects as required |

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| **Structure** |

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| Job Description | |
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| Job purpose | The core focus of this role is the administration of the Local Government Pension Scheme including the calculation and payment of scheme benefits within the statutory requirements of the scheme. |
| Operational management | * Create and maintain member records ensuring accuracy is of the highest standard. * Handle telephone enquiries from all stakeholders as a member of the Pensions Help and Information Line team. * Handle email enquiries from all stakeholders via the generic pensions email address and via other written correspondence. * Interpret and analyse complex instructions, using an increasing level of discretion based on experience. * Ensure the efficient and effective use of the pension administration system including all system generated letters and task management processes highlighting issues where encountered. * Undertake the efficient and accurate calculation and communication of all pension estimates and benefits within performance targets. * Identify and suggest new ways of working to make member related processes more efficient. * Undertake all member interfaces ensuring that response targets are met and quality levels are maintained. * Participate in special pension projects from time to time. * Develop knowledge and awareness of LGPS regulatory requirements. * Represent the Fund at meetings as required. * Plan and organise own workload within agreed service level agreements. * Work collaboratively with colleagues to ensure that calculations are completed and cross-checked in a timely manner. * Manage time in order to be able to contribute to team project work. * Contribute to the reduction in the volume of outstanding work.   **Grade G – all the above plus:**   * Calculate and check benefit calculations. * Contribute to and support the development and delivery of the NYPF’s data improvement plan. * Take responsibility for the more complex cases, identify unprecedented items and make decisions about referring them to more senior colleagues. * Continually evaluate processes to ensure improvements are identified and introduced. |
| Communications | * Ensure information supplied to all stakeholders is clear and accurate. * Contribute to communications events, projects and initiatives. * Provide support and guidance to members of the scheme. * Actively promote employer and member self-service.   **Grade G – all the above plus:**   * Collate and analyse feedback in order to continually improve service delivery. |
| Partnership / corporate working | * Liaise with employing authority contacts re operational tasks and to provide help and information. * Work closely with the in-house AVC provider to ensure that NYPF members receive excellent service and that benefits are processed accurately and promptly. |
| Resource management | * Maintain accurate records on all the administration systems used. |
| Systems and information | * Ensure all stakeholder queries and requests via email, phone or letter are responded to promptly and accurately in line with customer care targets and guidelines. * Take responsibility for the accuracy of the records on the pension administration systems. * Ensure the prompt and accurate reconciliation of errors and queries. * Ensure that all personal information communicated to stakeholders and other recipients is appropriately protected in line with Information Commissioner Guidelines and the Data Protection Act 2018. |

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| Person Specification | |
| Essential upon appointment | **Desirable on appointment** |
| Knowledge  At Grade F   * Awareness of pension schemes generally. * Awareness of local authority policy and procedures. * Awareness of the Local Government Pension Scheme.   At Grade 8   * Knowledge of Local Government Pension Scheme Regulations. * Good knowledge of all types of occupational pension provision. |  |
| Experience  At Grade F   * Administrative or pensions experience. * Working within a legislative framework. * Working to deadlines and targets. * Team-working. * Working with computerised systems. * Dealing with customers verbally and in writing.   At Grade G – all the above plus:   * Demonstrable experience of occupational pension schemes, specifically LGPS, including administration. * Substantial experience of completing and checking pensions calculations. * Working with a computerised pension administration systems including workflow and document imaging systems. * Working to and regularly achieving deadlines and targets. * Experience of dealing with sensitive customers such as the vulnerable and the bereaved. * Being responsible for seeing specific tasks or projects through to completion. * Supporting less experienced members of staff. * Working to statutory and legislative requirements and standards where appropriate. * Processing pension benefits using an administration system. * Process development and improvement. | **At Grade F**   * LGPS experience |
| Occupational Skills   * Ability to make decisions within own area of responsibility. * Ability to work on own initiative and without close supervision. * Ability to effectively identify workable solutions using analytical and problem solving skills. * Ability to prioritise workload and manage others expectations. * Good organisational skills. * Good interpersonal skills. * Good numeracy and literacy skills. * Ability to develop strong working relationships with other directorate staff and external organisations * Customer-facing role requiring the ability to converse at ease with customers and provide advice in accurate spoken English is essential for the post. * Attention to detail. | * Ability to assimilate new initiatives, technology and software and interpret information. |
| Professional Qualifications/Training/Registrations required by law, and/or essential for the performance of the role   * Qualifications to evidence a good standard of education particularly in Maths and English   At Grade F   * Willingness to undertake a recognised pensions industry qualification   At Grade G   * A recognised pensions industry qualification (exception only in cases of significant relevant experience) | * Pensions Management Institute or Other Professional Pension Qualification |
| Other Requirements   * Outgoing, enthusiastic, positive, self-motivated and demonstrates a ‘can do’ attitude. * Committed to providing exceptional customer care with a focus on continuous improvement of service delivery. |  |
| Behaviours | [Link](http://www.northyorks.gov.uk/article/23524/What-you-should-know-before-applying-for-a-job) |

NB – Assessment criteria for recruitment will be notified separately.  
Optional - Statement for recruitment purposes: You should use this information to make the best of your application by identifying some specific pieces of work you may have undertaken in any of these areas. You will be tested in some or all of the skill specific areas over the course of the selection process.