

## Role profile

<b>Job Title:</b>	Pensions Coordinator (Pensions Monitoring team)
<b>Department:</b>	HR Shared Service Centre (HRSSC)
<b>Directorate:</b>	Strategy and Change

<b>Grade:</b>	10
<b>Post no.:</b>	61040
<b>Location:</b>	Perceval House

<b>Role reports to:</b>	Pensions Manager
<b>Direct reports:</b>	None
<b>Indirect reports:</b>	None

## Job description

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

### Purpose of role

- To provide a quality assurance function for Ealing Council in respect of its pension provision.
- To monitor and quality assure the technical output, calculations and payments generated by the LPPA, thereby safeguarding the Council's financial resources and achieve corporate financial balance.
- Responsible for authorising correct and legally compliant payments are made from the Pension Fund, for Retirement Grants, Death Grants, Transfers, Refund payments and monthly pensions.
- Responsible for the calculation of redundancy payments to ensure the correct and legally compliant redundancy payments are made to employees.
- To maintain a detailed and comprehensive knowledge of all LGPS regulations and other statutory/regulatory requirements and employer discretions, and to translate this to effective, efficient, accurate and timely service delivery for all scheme members and employers.
- Responsible for the provision of data for new starters and leavers to the LPPA.
- Lead on the MDC / MCR monthly return submission to Teachers Pensions, ensuring it is submitted by the deadline set by teacher's pensions.
- Responsible for delivering the correct information to Teachers Pensions, working with schools' staff and liaising with the National Teachers Pension body. Responsible for delivering the correct data to NHSBA for employees with NHS pensions.
- The delivery of excellent customer service through the provision of HR pensions advice and services to staff, former staff, pensioners, and their dependants from across the Council. In doing so supporting and enabling the Council's directorates to deliver their business objectives.
- To provide universal and bespoke pensions solutions to customers.

- To deputise for the Pensions Manager as directed and required.

## **Key accountabilities**

### **KEY ACCOUNTABILITIES:**

- HRSSC Pension Co-Ordinator is directly accountable to the Pensions Manager
- Have an excellent knowledge of LGPS Regulations, Discretionary Payments Regulations, Teachers pensions legislation and HM Revenue & Customs (HMRC) requirements in respect of pension benefits, and entitlements for all types of scheme members.
- Performance management of the LPPA (or other contracted pensions administration provider)
- Have the experience and knowledge to be able to check complex calculations accurately and to tight deadlines for individual pension payments and payroll deadlines for the payment of monthly pensions.
- Responsible for the checking and authorisation of all financial calculations and payments due to be paid from Ealing Councils Pension Fund to ensure compliance with the LGPS and statutory legislation. To protect Ealing council's pension scheme by assuring payments are correct.
- To alert the LPPA to understated and or overstated pension entitlements and monitor the resolution of the issue.
- To scrutinise all LPP financial calculations are accurate and robust and challenge errors and/or omissions.
- To challenge calculations where they are inaccurate and/or incorrect, to ensure absolute compliance with statute, pension scheme regulations and regulatory direction.
- Responsible for making daily / weekly direct bacs and chap's payments on Lloyds CBO live system to members for Retirement Grants, Death Grants and Refunds and payments for Transfer values to other councils and pension schemes. Total direct payments made from the pension fund are more than ten million pounds per year.
- Responsible for the checking and set up of all monthly LGPS pension payments to pensioners and dependants on iTrent, the councils payroll system, to enable pension entitlements to be paid efficiently and promptly.
- Responsible for the calculation and setting up of teachers' dependant pensions.
- Responsible for the calculation of accurate redundancy payments and estimates for corporate staff, teachers, and non-teaching staff. Providing advice upon the applicability and application of the redundancy payments (local government) (Modification) Orders
- Responsible for redundancy payments being made to eligible employees.
- To have lead responsibility for the provision of information to teacher pensions and maintenance of teachers' pension records maximising the use of the HR & Payroll System iTrent and other web-based technology.
- Liaise with, and establish good working relationships, as required, with external service providers (, Midland iTrent, LPPA, Scottish Widows, Schools etc) and admitted bodies and attend meetings with external service providers as Ealing Council's representative.
- Manage new applications and disinvestments of Additional Voluntary Contributions (AVC's) with the councils AVC provider Scottish Widows.

- To deliver efficient and effective professional customer service focussed pension information on the Local Government Pension Scheme (LGPS), Teachers Pension Scheme (TPS) and the NHS pension scheme to a wide range of customers.
  - To attend annual pensions AGM and provide tailored advice on a one-to-one basis to employees who have enquiries about their own pension.
  - Ensure all customers are updated regularly and in a timely fashion on the position of their queries and escalate any delays.
  - Providing advice and guidance on complex and sensitive matters to scheme members and bereaved families, on complex queries in respect of scheme membership, benefits, and options., (for example, death in service, ill health retirements, people with a terminal illness and recently bereaved relatives) with empathy, compassion, and sensitivity.
  - To ensure responses take into account any reasonable adjustments the enquirer may need (for example, large print correspondence).
  - To communicate effectively to all levels of the organisation on pension matters including attending workshops and designing presentations for a range of members and employers.
  - Reconciliation of pension data between iTrent, the council's payroll system and the pensions administration system UPM.
  - Responsible for analysing, checking, and uploading of the monthly LGPS and Teachers pensions reports and rectifying any subsequent queries.
  - To alert LPP of data inaccuracies that could affect its financial calculations.
  - Responsible for the end of year annual return submission to NHS pensions.
  - Monitor the service of the external provider of the Pension Administration by analysing monthly reports and performance against performance indicators.
  - Ensure that procedures and processes are followed to accurately meet legislation and service requirements.
  - To collaborate as required with internal and external auditors conducting audits of the pension systems, processes, and activities.
  - To lead on the review and development of systems and processes, ensuring process documents are reviewed and kept up to date.
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- To participate in training, coaching, and learning with team members at all times to ensure constant knowledge transfer occurs and all new or amended processes are documented.
  - Responsible for training and supervising the pensions administrator and checking the work they produce.
  - To provide peer: peer support, by checking and verifying inter-team calculations and payments.
  - To use organisational skills to manage own workload, exercising good judgement and initiative to prioritise work, work to strict deadlines and be responsible for own service provision.
  - Able to recognise service delivery requirements and effectively communicate with members of the scheme, dealing with correspondence, queries, and requests across a range of activities, in a timely and accurate manner.
  - Adopting technology and e-based solutions to facilitate the most effective and efficient operation of the HRSSC.
  - Continuously improving own knowledge of pensions and people management practice,
  - Continuously developing understanding of the business operations of the Council and the needs of service areas
  - Researching new/changing pensions and employment legislation/policies, as directed. Attend local and national groups and meetings on local authority pensions.

To deputise for the pensions manager at the Pension Fund and Pension Board meetings.

- Responsible for own continuous professional development to maintain accurate and up-to-date knowledge of LGPS and Teachers pensions legislation, regulations, and Orders.
- Managing time to promote continuous service improvement and on-going service delivery.
- To organise work tasks, managing conflicting priorities to achieve service standards and meet deadlines.
- Ability to effectively plan, prioritise and execute tasks. Including, the ability to adapt to shifting priorities, demands and timelines.
- To participate in projects and tasks requiring specialist pensions input and/or pensions practice. Contributing to projects and working groups, as required
- To undertake long term projects as directed, for example the reconciliation project aligning the data held on the pensions administration system with data held on the payroll system for pensions in payment.
- Any other duties appropriate to the post and grade as required.

## **Key performance indicators**

### **KEY PERFORMANCE INDICATORS:**

- Compliance with relevant HR, pensions and information and data management legislation
- Development of professional and effective working relationships with all customer areas
- Strong partnership working with outsourced provider of administration services to achieve to time, cost, and quality.
- Understanding of services requirements with regard to HRSSC activities and driving forward service improvements.
- Monitoring of the LPPA's performance measurement against SLAs.
- Timely, accurate and appropriate response to requests for information and all other enquiries (measured through feedback, complaints etc).
- Organisational effectiveness and customer satisfaction levels (measured by surveys and customer feedback, complaints, etc.).
- Compliance with corporate standards and adherence to values and behaviours in relation to HR and information & data management.
- Meeting all audit requirements and operational deadlines

## **Key relationships (internal and external)**

- LPP (or contracted pensions provider), their agents and external contractors
- Teachers' Pension body,
- Colleagues in the HR shared service centre
- Core HR and OD colleagues (including the payroll and iTrent support teams),
- Colleagues in Finance
- HRSSC Managers and their Teams,
- Managers, employees, and trades union representatives across the Council,
- Former employees, pensioners, and their dependants

- Head Teachers, Deputy Head Teachers, School Business Managers and Administrators,
- External bodies such as, Midland I-Trent, admitted bodies, arms-length employers (e.g. Greener Ealing) and external payroll providers Scottish Widows and NHS Business Authority.
- HMRC and DWP

### **Authority level**

- Contribute to delivery of pension service to all clients/customers.
- Providing expert advice, information, and guidance on pension issues.
- People: sustains key working relationships with a wide range of customers including Executive Directors, Headteachers, employees, pensioners, and dependants,
- Policy: creates, applies, and evaluates protocols and procedures for the Council's Pension Fund
- Financial: assures the quality and accuracy of pension calculations and payments to safeguard the Council's financial efficacy.

## **Person specification**

Recruitment practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Disclosure and Barring Service (DBS) check.

### **Essential knowledge, skills and abilities**

1. In-depth technical knowledge and understanding of the LGPS, TPS and NHS Pension schemes plus associated regulations, legislation, statutory provisions, local arrangements, and policies.
2. Ability to understand technical pension queries.
3. Knowledge and understanding of people management and relevant employment legislation and policies in the pensions arena.
4. Ability to apply knowledge and skills gained to secure the continuous improvement of the pensions monitoring team and achieve efficiency, value for money and service standard targets.
5. Ability to deliver excellent customer focussed, business information and service in an operationally demanding and constantly evolving and changeable work environment.
6. Ability to work autonomously and flexibly, managing and adjusting own work and priorities within changing business demands.
7. Excellent IT skills, ability to use Microsoft Office and pensions systems to a very competent level.
8. Ability and approach to ensure that queries received in the Pensions Team are dealt with in a timely fashion and seen through to resolution.
9. Excellent communication skills both written and verbal with the ability to report, present, and communicate information effectively, including the ability to convey complex technical information to a range of audiences.

10. Excellent numeracy skills to calculate complex pension entitlements and redundancy payments.
11. Experience of service delivery through consistent process and applying industry best practice
12. Ability to work proactively and collaboratively within and across the team, ensuring shared priorities/outputs are clearly identified and attained and collective deadlines work demands and priorities are met.
13. Ability to build, develop and maintain positive relationships with customers, colleagues, and external bodies.
14. Experience of dealing with complex enquiries from customers groups from all areas of the business and from councillors and external bodies
15. Ability to provide guidance and advice to managers on pension issues.
16. Ability to contribute to the review of systems and processes.
17. Ability to check (and cross check) information, documents and correspondence for accuracy.

### **Essential qualification(s) and experience**

1. Substantial pensions experience gained in a complex organisation.
2. Significant knowledge of the LGPS and Teachers pension schemes.
3. Degree in a relevant discipline or equivalent
4. Significant experience of providing high quality, technically correct and accurate pensions information and business solutions.
5. Experience of using HR/payroll/pension systems.
6. Experience of service delivery through consistent process and applying industry best practice.
7. Experience of dealing with enquiries from customers groups from all areas of the business and external bodies.

## Values and behaviours

Improved life for residents	Trustworthy	Collaborative	Innovative	Accountable
<ul style="list-style-type: none"> <li>• Is passionate about making Ealing a better place</li> <li>• Can see and appreciate things from a resident point of view</li> <li>• Understands what people want and need</li> <li>• Encourages change to tackle underlying causes or issues</li> </ul>	<ul style="list-style-type: none"> <li>• Does what they say they'll do on time</li> <li>• Is open and honest</li> <li>• Treats all people fairly</li> </ul>	<ul style="list-style-type: none"> <li>• Ambitious and confident in leading partnerships</li> <li>• Offers to share knowledge and ideas</li> <li>• Challenges constructively and respectfully listens to feedback</li> <li>• Overcomes barriers to develop our outcomes for residents</li> </ul>	<ul style="list-style-type: none"> <li>• Tries out ways to do things better, faster and for less cost</li> <li>• Brings in ideas from outside to improve performance</li> <li>• Takes calculated risks to improve outcomes</li> <li>• Learns from mistakes and failures</li> </ul>	<ul style="list-style-type: none"> <li>• Encourages all stakeholders to participate in decision making</li> <li>• Makes things happen</li> <li>• Acts on feedback to improve performance</li> <li>• Works to high standards</li> </ul>