

# City of Wolverhampton Council

## Job Description

<b>Job title:</b>	Pensions Assistant
<b>Directorate:</b>	West Midlands Pension Fund
<b>Service:</b>	Operations
<b>Location:</b>	Any suitable location within the City of Wolverhampton
<b>Workstyle:</b>	Flexible
<b>Responsible to:</b>	Pensions Team Leader
<b>Grade:</b>	4

### Job Purpose and Role:

Calculation of members pension benefits including Refunds, Deferments, Transfers and associated processes

Working to set targets and ensuring achievement of key performance indicators for the team.

Supporting the day to day management of the teams workload ensuring priority cases are reviewed and actioned promptly.

### Principal Duties and Responsibilities:

1. Present a customer friendly, positive and professional image of the Fund to customer, with the aim of satisfying enquiries with a single contact
2. Provide a customer focussed service by prioritising workload according to deadlines.
3. Calculation of members pension benefits including Refunds, Deferments, Transfers and associated processes
4. Working to set targets and ensuring achievement of key performance indicators for the team.
5. Supporting the day to day management of the teams workload ensuring priority cases are reviewed and actioned promptly.

6. Processing and validating all amendments to a members record that result from changes in employment and professional circumstances.
7. Providing a comprehensive and responsive service to employers in regard to data queries and outstanding data
8. Working to set targets and ensuring achievement of the teams workload ensuring
9. To be responsible for the creating and authorising new member records based on information received from employing bodies within the set KPI.
10. To process and validate all amendments to a member's record as a result of changes in employment and personal circumstances including AVC contracts within the set KPI.
11. To calculate and verify adjustments to pensioner member benefits as a result of applying the pension increase legislation modification or Guaranteed Minimum Pension when attaining state pension age, complying with pension payroll timescales within the set KPI.
12. To deal with a range of correspondence, telephone queries and personal visits from Scheme members. Respond to all enquiries in a positive and professional manner and process them in accordance with the Funds procedures.
13. To issue revised /duplicate benefits statements to members within the set KPI.
14. To request missing documentation for internal transfers, pay figures and hours for concurrents and leaver documentation from employers when notified by the member, all within the set KPI
15. To take responsibility for a 'First Call Resolution' service to customers and employers enquiries in relation to Fund services and the provision of an extensive information service in a positive and professional manner either face-to-face; over the telephone or by using IT systems with the aim of 'closing' enquiries within a single customer contact.
16. To act in accordance with the Council's Constitution and other Codes of Conduct.
17. To participate in staff development, appraisal and training as appropriate, including continuous professional development.
18. To comply with the Council's agreed policies and procedures including but not limited to Health and Safety, and Equal Opportunities Policies, General Data Protection Regulations, Freedom of Information Act, Financial Management Regulations and other relevant Council and Government Regulations, Directives and City-wide priorities.
19. To undertake any other tasks, duties and responsibilities as directed and appropriate to the grade and role of the post subject to any reasonable adjustments

under the Disability Discrimination Act 1995 as incorporated into the Equality Act 2010.

20. To participate in the wider development of the service and contribute to service improvement as required.

21. City of Wolverhampton Council is committed to Corporate Parenting.

“Corporate Parenting is the collective responsibility of the Council to provide the best possible care and protection for children who are looked after.”

To meet the changing needs of the service and/or to provide cover the postholder may be required to provide assistance in other teams as directed by the Benefits Operations & Payroll Manager.

**Key Contacts**

The post holder will have considerable contact with all staff across the Fund.

Effective date .....

Signature of jobholder .....

**CITY OF WOLVERHAMPTON COUNCIL**

**PERSONNEL SPECIFICATION**

**Post Designation:** Pensions Assistant

**Job Class:**

**Job Purpose and Role :** To assist with the provision of a comprehensive, efficient, effective and responsive front line service to Employers, pensioners and other members of the Fund in a telephone, face to face, e-mail or other media, ensuring excellent customer service in every interaction.

<b>FACTORS</b>	<b>ESSENTIAL</b>	<b>DESIRABLE</b>	<b>HOW IDENTIFIED</b>
Qualifications	Educated to GCSE level or equivalent	Working towards pensions qualification, e.g. PMI, CIPP.	Application Form Production of Certificates
Training	Continuation of qualification if part qualified.		Application Form Interview
Experience	Good pension business awareness.  Committed to providing an excellent service and improving the performance of the Fund.  Communicates effectively with employers, scheme members and other funds to ensure timely completion of processes.	Local Authority accounting and budgetary experience.	Application Form Interview References

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<b>FACTORS</b>	<b>ESSENTIAL</b>	<b>DESIRABLE</b>	<b>HOW IDENTIFIED</b>
Special Knowledge/Skills	Knowledge of the pension regulations and disclosure targets which impact operations processing  Understanding of pension related matters e.g DWP or Benefit experience evidenced through free form letter writing.  Excellent customer care skills with ability to deal with a variety of customers  Understands the wider impact of decisions across the service	Positive approach to pensions work with a regional customer base.  Contributes to the Funds Business Plan and strategic direction.	Application Form Interview References
Personal Qualities	Confident and clear in both written and verbal communication with a variety of customers	Flexible in approach to meet operational workloads which are dictated by statute and regulation.	References Interview Testing
Interests and Motivation relevant to the job	Ability to work to strict deadlines and meet disclosure targets.  Ability to work as an effective member of team.  Focused on a professional quality output for all processing work	Potential to develop skill level for promotion within the Pensions Service.	Application Form References Interview

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<b>FACTORS</b>	<b>ESSENTIAL</b>	<b>DESIRABLE</b>	<b>HOW IDENTIFIED</b>
Commitment	Evidence of clear understanding with regard to the impact of the Pensions Regulation on Employing Bodies and Scheme Members	Meets deadlines and targets and is focused on overcoming obstacles to achieve a desired result.	References Interview