

## ROLE PROFILE

<b>Job family</b>	<b>Organisational Support</b>	<b>Role profile number</b>	<b>OS11-2360</b>	<b>Grade K</b>
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**Job purpose:** Provide specialist professional advice and solutions to enable the most appropriate solutions for a complex work area within and across service areas.

The most common grade for professional level posts across the organisation. Grade K posts are higher in 'Creativity & Innovation' and 'Decisions', with a requirement for problem solving higher than grade J posts. These posts are required to give recommendation and implementation of solutions which have a direct impact on relevant stakeholders. These posts require not only a relevant professional qualification but also practical experience of applying the skills obtained through study, in the workplace

<b>Factor</b>	<b>Relevant Job Information</b>
Supervision and/or Management of People	No full management of a team but will be required to monitor the quality and quantity of the work of others. Will provide advice, guidance and support to colleagues to ensure whole team achievements are met.
Indicative qualifications	Degree in relevant profession, or equivalent experience/skills. Licence / certificate / qualification required for the role ITQ 2 or equivalent ICT skills and abilities, demonstrating significant experience in related IT systems.
Knowledge and Skills	Relevant professional experience post qualification in a similar work environment. Expert knowledge of relevant policy, systems, work practices, professional guidelines, legislation in the area of specialism. Excellent ICT skills including use of Microsoft applications and specialist systems. Proven ability to provide advice and make recommendations based on specialist knowledge of specific area. Highlight and resolve potential risks. Knowledge and experience of contributing to the development of policies, procedures and practices. Familiar with wider sector / external influences. Detailed operational knowledge of systems in terms of functionality, capability and availability. Excellent interpersonal, persuasion, influencing and negotiating skills. Excellent planning and organisational skills, with proven ability to prioritise and co-ordinate workloads, monitor and evaluate work, to ensure deadlines are achieved Proven ability to interpret and analyse statistical and numerical data, drawing conclusions from the data to make informed decisions. Proven ability to cope with conflicting and changing demands through good time management and the ability to work under pressure. Experience of co-ordinating projects with service / organisation impact Proven ability to produce business focussed, user friendly reports, policy and project documents where appropriate.
Creativity and Innovation	Apply professional knowledge and experience to interpret and recommend policy, resolve complex issues, proactively anticipate problems and deliver solutions which enhance the quality and efficiency of services. Responsible for meeting performance standards within a policy framework and regulatory guidelines. Considerable scope to exercise initiative in taking action - within the boundary of well-defined policies. Contribute to long term strategies. Apply specialist/professional expertise and use judgement to make decisions where solutions are not obvious to meet customer requirements. Will be required to plan over a longer period (a year or more) and contribute to long term strategies Lead initiatives to design and deliver improvements and transformation Manage projects, or contribute to larger organisation wide programmes
Contacts and Relationships	Provide advice and guidance on complex issues which could be contentious and challenging in nature.

	<p>Ability to build relationships and engage successfully with colleagues /partners /customers / contractors and suppliers.</p> <p>Negotiation showing tact and diplomacy to deal with conflicting requirements or opinions and the ability to make decisions on the most appropriate action to reach an acceptable conclusion.</p> <p>Contacts will include: Senior managers, leadership team, councillors, external bodies and partners.</p> <p>Liaise with and/or advise senior members of staff regarding service issues, problems and processes.</p> <p>Be a representative on behalf of the Service area / Council internally and / or externally</p>
Decisions – Discretion & Consequences	<p>Using general guidelines and utilising a wide range of relevant information, make decisions which impact on the whole organisation. Advice is not normally available.</p> <p>Assess the options and take appropriate action, where only general guidelines exist.</p> <p>Decisions to ensure outcomes are achieved which serve the best needs of the customer and as a consequence can result in improved services.</p> <p>The consequences of the decisions will have a significant effect across the organisation.</p> <p>Deliver complex work programmes within or across specialist areas to meet established operational targets.</p> <p>Research, manage and evaluate complex information / data / feedback. Identify and interpret organisational issues, trends and problems which may have a broad impact.</p> <p>Identify additional requirements or shortfalls and recommend innovative, robust solutions.</p> <p>Monitor and report on service standards as required</p>
Resources	Little or no responsibility for physical or financial resources.
Work Demands	Work subject to interruptions and deadlines, involving changing problems, circumstances or demand.
Work Environment	Office based, but may involve some travelling to other council buildings.
Our identity	<p><a href="#">Our Identity</a> sets out who we are and provides a shared understanding of how we are all expected to lead, work and act with each other, our partners and our residents to deliver our services and build stronger communities. They enable us to continually evolve and adapt to meet the changing needs of our residents and ensure that we continue to deliver great services and make a difference to the people of Wiltshire.</p> <p>All of us are expected to demonstrate the elements of <a href="#">Our Identity</a> in how we work to shape and create the organisation we want to be part of. It should influence our decisions, activities, projects and ways of working</p> <p>Wiltshire Pension Fund also has its own identity, vision and goals, which are set out on the Fund's webpage: <a href="https://www.wiltshirepensionfund.org.uk/Our-vision-goals-and-values">https://www.wiltshirepensionfund.org.uk/Our-vision-goals-and-values</a></p>
Health & Safety	All employees are required to carry out all duties and responsibilities with reasonable care for the health and safety of self and others and report any potential hazards or unsafe practices to their line manager.
Equalities	Wiltshire council is committed to ensuring employees do not discriminate against colleagues, suppliers or third parties at work or harass or victimise others. Incidents of discrimination at work are taken seriously and employees are encouraged to report incidents via their manager or anonymously via <a href="#">the whistleblowing policy</a> .
Authority to work in the UK	All employees must have the legal authority to work in the UK. Non-EU nationals must have the relevant approval to work in the UK from the UK Border Agency. Copies of all documents provided as proof of identity are retained for our records, by providing these proofs the council will treat this as consent.

The above profile is intended to describe the general nature and level of work performed by employees in this role and does not detail a list of all duties and responsibilities. The Council reserves the right to amend this role profile as necessary.

## ROLE DESCRIPTION

<b>Role description:</b>	Data, Reporting and Performance Lead	
<b>Role profile family:</b>	Organisational Support	
<b>Role profile number and grade:</b>	OS11-2360	Grade K
<b>Number of posts:</b>	1	
<b>Service/Team:</b>	Pensions	
<b>Reports to:</b>	Pension Fund Operations Manager	

### Job Family overview

#### Organisational support job family overview:

Delivery of services to support the Council and its partners in longer term; corporate compliance, contracting, planning, performance, policy and strategy.

- Focus on the business and service infrastructure of the Council and its partners to ensure effective management and proper compliance
- Advice and services rendered will generally be accepted as authoritative and recommended practice
- Specialist area and/or management knowledge
- Understanding area concepts and plans
- Defining implications of external influences and trends
- Shaping of Council responses including service plans/strategies & policies
- Definition & management of strategic planning processes
- Monitoring and reporting of performance

### Service / function Context

The Data, Reporting and Performance Manager role forms part of the Wiltshire Pension Fund Management team. Wiltshire Pension Fund is established under Local Government Pension Scheme Regulations.

The purpose of the Fund is to meet all future pension liabilities of its scheme members, whilst at the same time seeking to minimise the contributions that need to be paid into the Fund by the employer bodies. The level of employer contributions is assessed every three years through an actuarial valuation of the Fund.

The Wiltshire Pension Fund administers pensions on behalf of over 170 different employer organisations, ranging from local authorities, FE colleges, academies, charities and third-party service providers. The Pension Team is responsible for the governance and administration of the Wiltshire Pension Fund. The LGPS benefits being administered amount to liabilities and assets currently valued at c£3bn

The correct administration is critical to ensure the Fund operates within various, complex regulatory requirements and avoids fines by the Pension Regulator along with the associated reputational risk.

The management of the Fund's assets and liabilities is attributable to its solvency and determines the level of contributions to be paid by employer's organisations, a significant cost for them (circa. £40m per annum for Wiltshire Council alone) and for many smaller employers this has a direct impact on their financial viability.

The Wiltshire Pension Fund ensures all pension benefits are paid correctly, on a timely basis and in line with the scheme regulations. It manages the relationships with the Fund's 170+ scheme employers, overseeing the admission and cessation of these organisations.

It monitors and reviews the investment strategy of the Fund and brings forward proposals for improvement as appropriate to ensure the assets and costs of the Wiltshire Pension Fund are accounted for and reported correctly and legally. Investment manager services are procured on behalf of the Fund via the Brunel Pension Partnership, of which the Fund participates together with 9 other LGPS Funds.

It procures actuarial services and other third-party providers which value more than £7m and to ensure the continual development and enhancement of the pension administration service by improving performance and appropriate development of IT.

## Job Purpose

The role's purpose is to ensure data integrity in the Fund's administration system, and to work with other teams across the Fund to provide the data and reporting needed to fulfil their own functions and to enable understanding and analysis of the Fund's overall performance, which in collaboration with other members of the Operations Team, will lead to identification and implementation of improvements.

The post holder will produce meaningful reporting, using the Insights reporting tool (which alongside standard reports, can be customised using Tableau), to satisfy a number of diverse needs across the Fund, from performance against the Fund's KPIs, to designing reporting that can be used to communicate service expectations with the Fund's employers, to exceptions reporting, member demographics, and much more. Consequently, a working knowledge of Tableau will be needed for this role.

The post holder will work closely with the Fund's Projects Lead and Systems Manager and Business Analyst to deliver resilience across the Fund's operations. The post holder will need to balance requirements of many different stakeholders across the Fund.

The Data, Reporting and Performance Manager will form part of the Pension Fund Management Team and as such will help decide upon general strategic and management matters.

Specific requirements for this post:

#### Data

- Statutory reporting: Producing and verifying the accuracy of reports that generate statutory information for HM Revenue & Customs (HMRC), the Pension Regulator (tPR), SAB, GAD and any other similar bodies. To produce the data for the Annual Report in line with CIPFA guidance. (Monthly)
- Triennial Valuation: To coordinate the Triennial Valuation data submissions for the Fund with the Fund's actuary, ensuring appropriate project planning is in place, all the tasks are allocated, monitored and managed, all timeframes are met, data appropriate cleansed and errors cleared, and progress regularly reported back to the Pensions Administration Lead throughout the exercise.
- Data Cleansing: Undertake regular data cleansing exercises to measure data quality, including but not limited to the tPR Common and Conditional/scheme specific data scores, and oversee all necessary remedial action identified is taken to ensure system data quality meets or exceeds the targets set by the Pension Regulator, avoiding fines for the authority resulting from non-compliance.
- End of year: Overseeing, alongside the Pension Administrations Lead, the completion of the overall year-end reconciliations exercise (which will reduce in scale with the full introduction of i-Connect), working with both the Operations and Employer Services Teams to ensure they resolve all data queries identified and meet their targets to ensure statutory reporting targets (e.g. Annual Benefit Statements) are met and a breach isn't required to be reported to the Local Pension Board and the Pension Regulator.
- Data reconciliations: To support the Operations Manager in recommending, establishing and reporting on key reconciliations that the Pension Fund should be undertaking and ensuring these are being met. Ensuring that all key controls are being carried out and all major issues are identified quickly and resolved, providing assurance from an audit perspective to the Pension Committee on the management of risks.

- Data cleansing: To identify areas where data quality is poor and putting in place actions to remedy by seeking cross Fund support and resource to take the necessary actions (typically employer and member services)

### Reporting

- To use the Insights reporting tool, customized by use of Tableau as appropriate, and other sources of information for reporting to develop and deliver customized reports as required for use across the whole Fund. To establish and maintain a reporting request log and ensure the accurate production and maintenance of all reports. To become the subject matter expert on all systems reporting matters.
- To manage a complex range of requirements, prioritizing report development in line with clearly demonstratable business needs.
- To promote efficiencies in the use of data, using reporting for multiple purposes and to add measurable value to the Fund's performance, by KPI improvements, improvements in controls, etc.
- Produce exceptions reporting to proactively identify areas where controls or processes may not be operating as expected, so that action can swiftly be taken, ensuring that policies are adhered to and problem areas are not permitted to build up.

### Performance

- Developing and producing management information, KPIs and other performance data as required for Management, the Local Pension Board and Pension Fund Committee. (Monthly)
- To deliver accurate and meaningful reporting, as set out above, on the Fund's overall performance, adopting a Whole Fund perspective, and using this reporting to identify areas for improvement and action.
- Deliver weekly reporting on the Fund's administration KPIs, analysing the data prior to circulation to identify areas where further investigation is needed. Performance reporting will be produced for both managers (in detail) and at summary level for the full Pensions team.
- To provide in depth analysis of the underlying reasons and root causes for trends and performance movements to provide insight and suggested actions to the relevant managers. Wherever possible, these should be backed up by evidence and objective based reasoning rather than assumptions.
- Deliver monthly and quarterly reporting of administration KPIs at a high level for manager review and in a format appropriate for the Local Pension Board and Pension Fund Committee.
- Work with the processing teams to ensure that any areas for concern identified through the performance reporting are swiftly identified, and following up on any necessary actions.
- Develop performance reporting on areas outside the administration KPIs, on a variety of different areas to enable senior management to understand, at a glance, the overall operational health and performance of the Fund (an example could be developing reporting on staff metrics, for example sickness absence, completion of training etc.).



Working closely with the Fund's Projects Lead and Systems Manager and Business Analyst to understand the full breadth of the Fund's operations, providing cover and operational resilience, providing cover and support for those other roles as necessary.

Contributing to the overall Fund vision and strategy via active participation in the Fund's management team meetings.

## Person Specification

Specific qualifications, knowledge, and skills required for this role:

### Essential

#### Professional Qualifications/training

- Educated to degree level or an equivalent level of experience
- Evidence of on-going commitment to Continuing Professional Development (CPD)

#### Knowledge

- Evidence of specific LGPS pension expertise
- An appreciation of the wider issues facing the pensions industry nationally and service deliver in local government
- Excellent understanding of Tableau (or another programming language, with a willingness and proven ability to learn Tableau)
- Good understanding of programme and project management methodologies.
- Good functional understanding of key technologies to support transformation.

#### Experience

- Demonstrable experience as a reporting manager or similar over a period of three years or more.
- Experience of administering a large final salary pension scheme
- Evidence of devising or being involved with creative solutions to service-based issues, including using appropriate software.
- Experience of leading on delivering service improvements
- Experience of operating at a senior level to implement cross-service change initiatives.
- Experience of change recommendations being successfully implemented.
- Experience of preparing business cases for change including supporting financial data.
- Experience of writing and presenting proposals to senior staff including directors.

#### Skills

- A pro-active and creative approach with a real drive for change and challenge.
- Excellent communications skills, both verbal and written, and well developed report-writing skills.
- Excellent inter-personal skills with an appropriate level of assertiveness balanced by a diplomatic and sensitive approach.

- Advanced spreadsheet and word-processing skills.
- Well developed business presentation skills.
- Well honed organisational skills, including the ability to work to tight deadlines and manage competing priorities.
- Evidence of strong influencing and persuasion skills.
- Self motivated, enthusiastic and committed.
- A credible confident approach.
- A natural team player who will complement the existing team.

### Desirable

#### Professional Qualifications/training

- Relevant business change methodology accreditation (e.g. Lean, Business Process Reengineering (BPR) or Six Sigma).

#### Experience

- Experience of running a Lean intervention.
- Experience of rapid process improvement techniques

#### Skills

- Extensive experience of computerized pensions administration systems, in particular Altair or UPM.

### Career graded posts

This post does not form part of a career grade.



## Supporting information

Driving classification	
<b>Occasional driver</b> A valid UK driving licence is not required. Occasionally may need to travel to different locations in order to undertake the duties of the role.	<input checked="" type="checkbox"/>
<b>Regular Driver</b> Must hold a valid UK driving licence (with no more than 6 penalty points) and have access to either their own car or a pool car in order to undertake the duties of the role unless other forms of transport are available and viable to perform the role, including public transport. Or a reasonable adjustment has been agreed.	<input type="checkbox"/>
<b>Required Driver</b> Must hold a valid UK driving licence (with no more than 3 penalty points) and will drive a vehicle supplied by the Council in order to undertake the duties of the role.	<input type="checkbox"/>
Employees should refer to the Corporate Driving at Work policy for further information.	

Political restriction	
This role is politically restricted. The job holder is not permitted to undertake political activity involving standing for election as a member of parliament, as a member of the Scottish or Welsh Parliaments, or as a local councillor. The job holder is furthermore not permitted to canvass on behalf of a political party or a person who is already, or who seeks to be, a candidate. In addition, they may not speak to the public or publish any written or artistic work that could give the impression they are advocating support for a political party	<input type="checkbox"/>
This role is not politically restricted	<input checked="" type="checkbox"/>

Professional fees and related occupational costs	
As part of this role, or to support professional development, the job holder is required to be a member of a professional body or association. The job holder is responsible for payment of all professional fees, memberships, registrations or subscriptions and no reimbursement or contribution towards these will be provided by the council	<input checked="" type="checkbox"/>
This role does not have any professional or occupational membership requirements	<input type="checkbox"/>

Clearances – Disclosure & Barring Service (DBS)	
This role will be engaged in 'regulated activity' providing specific services relating to children or vulnerable adults and is subject to a Disclosure from the Disclosure and Barring Service.	<input type="checkbox"/>
This role is exempt from the Rehabilitation of Offenders Act 1974 and will require an Enhanced DBS check before appointment can be confirmed.	<input type="checkbox"/>
This role is not subject to a Disclosure from the Disclosure and Barring Service in order to undertake the duties of the role.	<input checked="" type="checkbox"/>

Clearances – Baseline Personnel Security Standard (BPSS)	
This role requires access to the GCSX network and is subject to a BPSS check	<input type="checkbox"/>
This role is not subject to a BPSS check	<input checked="" type="checkbox"/>

Clearances – Non-Police Personnel Vetting (NPPV)	
This role requires working in partnership with the police, and/or having access to Police related systems and is subject to a NPPV check at <b>level 2*</b> . (*regular access to police premises and police information, intelligence and financial or operational assets. Occasional access to those deemed 'secret').	<input type="checkbox"/>
This role requires working in partnership with the police, and/or having access to Police related systems and is subject to a NPPV check at <b>level 3*</b> (*regular unsupervised access to police premises and/or access to police information and/or information systems and/or hard copy material either on police premises or by remote access up to "secret" level. A level 3 includes a check on you, your spouse/partner, co-residents, and all family members).	<input type="checkbox"/>
This role is not subject to a NPPV check	<input checked="" type="checkbox"/>

Safeguarding	
For all roles within Children's Services. Wiltshire Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and all staff are expected to share this commitment. You will be expected to report any concerns relating to the safeguarding of children, young people or vulnerable adults in accordance with agreed procedures. If your own conduct in relation to the safeguarding of children, young people or vulnerable adults gives cause for concern, the council's agreed child protection/vulnerable adults protection procedures will be followed.	<input type="checkbox"/>
For all roles within Adult Social Services. Wiltshire Council is committed to safeguarding and promoting the welfare of vulnerable adults and all staff working for the council are expected to share a commitment to this. You will be expected to report any concerns relating to the possible abuse of a vulnerable adult in accordance with the agreed interagency safeguarding adults' procedures. If your own conduct in relation to the safeguarding of vulnerable adults gives cause for concern, the council's agreed interagency safeguarding adults' procedures will be followed, alongside implementation of the council's disciplinary procedure. The job holder is accountable for their safeguarding of vulnerable adult responsibilities to their line manager.	<input type="checkbox"/>
For all other roles within the council. Wiltshire Council is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and all staff are expected to share this commitment. You will be expected to report any concerns relating to the safeguarding of children, young people or vulnerable adults in accordance with agreed procedures. If your own conduct in relation to the safeguarding of children, young people or vulnerable adults gives cause for concern, the council's agreed child protection/vulnerable adults protection procedures will be followed.	<input checked="" type="checkbox"/>