

## ROLE PROFILE

<b>Job family</b>	<b>Regulation &amp; Technical</b>	<b>Role profile number</b>	<b>RT07-2372</b>	<b>Grade G</b>
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**Job purpose:** Monitor and enforce prescribed regulatory areas, which will include but is not limited to, recommendations regarding infringement, resolution advice, and event based activities.

Grade G posts are higher in 'Creativity & Innovation' with the requirement for on-going problem solving but within clear defined procedures. These posts also require a higher level of 'Knowledge & Skills' with a good understanding and experience of relevant processes, policies and systems acquired through both formal training and skills obtained in the workplace.

<b>Factor</b>	<b>Relevant Job Information</b>
Supervision and/or Management of People	No management of staff. No supervisory responsibility other than providing guidance and support to colleagues.
Indicative qualifications	HNC or NVQ level 4 or equivalent experience/skills. ITQ 2 or equivalent skill and ability. Working towards relevant professional qualification. Licence / certificate / qualification required for the role.
Knowledge and Skills	High level of relevant and practical experience. An advanced understanding of relevant procedures and working practices. Good knowledge of specialist function relevant to service area. Excellent ICT skills including use of Microsoft applications and specialist systems Experience in the research, analyse and presentation of information Experience in the use of specialist equipment / systems / techniques relevant to the role Good communication and interpersonal skills, able to explain technical / legal issues in a straightforward manner Ability to draft up technical reports and drawing conclusions from the data to inform decision making. Good knowledge of other areas of the authority relevant to the service Good organisational skills and the ability to prioritise workloads and achieve deadlines.
Creativity and Innovation	Work on own initiative to manage own activities. Creativity and problem solving is a feature of the job, exercised within general guidelines of the service area. Identify areas where improvements could be made within own role Take appropriate action to ensure / support enforcement of / compliance with regulations Ensure compliance with safe practice and the legal use/operation of specialist equipment. Identify method of analysis to use and action to be taken within a defined area of responsibility May research and resolve problems as part of a support team.
Contacts and Relationships	Provide advice and guidance where information is less well established and where situations may not be straightforward. Deal with people at all levels confidently, sensitively and diplomatically. Be first point of contact on a range of queries from internal / external customers, may be dealing with challenging situations where influence could be required. Contacts will include: Colleagues, customers, members of the public, and stakeholders. Co-operate with and support colleagues and managers. Escalate problems / issues as necessary. Be a point of contact for clients, providing immediate assistance where situations may not be straightforward. Liaise with external agencies / contractors to exchange information as required
Decisions – Discretion & Consequences	Work is carried out following the framework of accessible guidelines and processes. Decisions are made based on a range of established practices The consequences of the decisions will have a material effect on the service.

Factor	Relevant Job Information
	<p>Plan, organise and deliver own work to support the delivery of the regulatory / statutory / legal service and ensure completion of tasks within required standards and timescales.</p> <p>Investigate compliance / legal issues within area of responsibility. Including where required more complex / serious issues within specific area of specialisation</p> <p>Collate, enter, process and analyse information / evidence using the appropriate systems.</p> <p>Research and evaluate information as required and produce reports with recommendations.</p> <p>Work with partner organisations as required</p> <p>Support customers to plan improvements and monitor outcomes.</p> <p>Assist in the preparation of tenders and contracts.</p> <p>Organise and maintain records and documents using appropriate process / system</p> <p>Undertake external visits to support service delivery.</p>
Resources	Little or no responsibility for physical or financial resources
Work Demands	Work subject to interruptions and at times may be competing demands of work priorities.
Work Environment	<p>Work may require some physical effort.</p> <p>Majority of work may be performed outside in all weathers or exposure to moderate noise or dirty or difficult and unpleasant surroundings / conditions.</p> <p>Work potentially involving some risks due to nature of activities being provided and / or environment or public / customers.</p>
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 ten 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>
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.

Wiltshire Pension Fund also has its own identity, vision and goals, which are set out on the Fund's webpage: <https://www.wiltshirepensionfund.org.uk/Our-vision-goals-and-values>

## ROLE DESCRIPTION

<b>Role description:</b>	Member Services Officer	
<b>Role profile family:</b>	Regulation & Technical	
<b>Role profile number and grade:</b>	RT07-2372	Grade G
<b>Number of posts:</b>	Variable	
<b>Service/Team:</b>	Pensions	
<b>Reports to:</b>	Member Services Manager	

### Job Family overview

#### Regulation & Technical job family overview:

Monitoring and enforcement of prescribed regulatory areas. Provision of services of a technical, vocational or specialist operational nature to internal and external customers

- Assessment of physical or administrative situations
- Judgement or recommendation regarding infringement
- Advice on resolution to participant
- Delivery of authoritative technical services to meet specific event based request
- Vocational and / or theoretical knowledge and skills in specific discipline

### Service / Function Context

The overall responsibilities of the service/function are:

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 purpose of this post is, using their knowledge to administer pension benefits. This includes:

- the interpretation and application of the Local Government Pension Scheme (LGPS) regulations in conjunction with Social Security and HMRC Taxation rules;
- determining and processing leavers benefit entitlements for age, redundancy, efficiency, flexible and employers consent retirements and dependent death benefits;
- Aggregation of benefits
- calculating and initiating payment of deferred benefits due for payment and making adjustments to pensions already in payment;
- Support Scheme members by answering technical queries over email by phone

Specific duties and responsibilities include:

## **Processing tasks:**

- **Active to retirement status:** To calculate and initiate payment of standard retirement benefits, excluding cases which involve the payment of Additional Voluntary Contribution (AVC) Funds where applicable and any increments for the Guaranteed Minimum Pension (GMP). To calculate and provide estimates of retirement and death benefits to scheme members and employers along with estimates of early retirement/ redundancy pension strain costs to employers and beneficiaries taking account of the regulations and how employers have decided to exercise discretion within those regulations.
- **Deferred into pay:** To calculate and initiate payment of deferred benefits and to adjust pensions in payment (i.e. National Insurance modifications, Guaranteed Minimum Pensions (GMPs) and Pension Increases).
- **Trivial commutation:** To process trivial commutation requests in line with the prevailing legislation.
- **Intrafunds and aggregations:** To process Local Government Pension Schemes transfers out of the Fund for joining/leaving members. To process intrafunds in/internal aggregation for the A1/A2, B1/B2 and D2 (Final salary scenarios) – using the LGA definitions of these terms.
- **Aggregation (internal):** Processing of standard aggregation and concurrent membership calculations in respect of individuals with previous LGPS membership, setting out the various options to the scheme member enabling them to make informed decisions.
- **APCs:** To process applications for Additional Pension Contributions (APC) and when appropriate to convert APC funds into service credits and inform retiring members of their tax free cash options.
- **Self-checking/Peer-checking:** To self and, as required, peer check work using expert judgement and within the guidelines set by the Member Services Manager.

## **Customer service**

- **Enquiries:** To answer technical member queries via post, email and phone, to provide cover of the pension enquiry helpdesk during office opening hours and to attend pension clinics and provide face to face surgeries for members as and when required.
- **Member Self Services:** To support members to log onto the system successfully and use the functionality held with it.

## Administrative cover:

- **Member Services Assistant:** To perform all aspects of the Member Services Assistant role as and when required (for example, when that person is on annual leave or the post is vacant)

## Other skills

- To prioritise work in line with the work allocation system set my management, to meet processing target goals and to support the Fund to deliver its administrative Key Performance Indicators.
- To actively propose processing changes by using the change request log or providing suggestions to the appropriate manager (normally via the Member Services Manager). To support Fund projects and act as a subject matter expert for the tasks undertaken by this role.
- To complete manual calculations for legislation changes which cannot be undertaken in the pension software system, while supporting any system testing as amendments are made to the pension database.
- To work within the rules of LGPS Regulations and to use expert judgement to recommend alternative approaches where the Regulations are unclear or the standard procedure is not appropriate for the member case being worked upon.
- To carry out any other reasonable duties within the overall function, commensurate with the grade and level of responsibility of the role.

## Person Specification

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

### Essential

- A willingness and commitment to work towards the Chartered Institute of Payroll & Pensions (CiPPs) Certificate in Pensions Administration and an ability to achieve a working knowledge of the Local Government Pension Scheme regulations.
- Experience of computerised systems
- Sound numerical skills
- Proven experience working in a numerical role in a professional environment
- Proven customer care skills
- Excellent inter-personal & communication skills

- Ability to interpret and explain complex legislation in simple terms and incorporate into working practices
- Ability to work quickly and as part of a team in a busy and pressurised office environment
- Good organisational skills
- Able to demonstrate an innovative and pro-active approach to work
- Excellent ICT skills on Microsoft Office products, including Outlook, Word, and Excel
- Ability to confidently collaborate and network with neighbouring authorities to share ideas and improve working practices
- Diplomatic and sensitive approach matched with a suitable level of assertiveness
- Strong customer focus
- Evidence of commitment, enthusiasm and self-motivation

## **Desirable**

- Experience of working in the LGPS
- Experience working with the Altair benefits administration system

## **Career graded posts**

This post forms part of a career grade. Progression through the grades (G-H-I) will be determined by a formal assessment.

## 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.  Employees should refer to the Corporate Driving at Work policy for further information.	<input type="checkbox"/>

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 be 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 type="checkbox"/>
This role does not have any professional or occupational membership requirements	<input checked="" 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

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This role is not subject to a BPSS check

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### 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 **level 2\***. (\*regular access to police premises and police information, intelligence and financial or operational assets. Occasional access to those deemed 'secret').

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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 **level 3\***(\*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).

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This role is not subject to a NPPV check

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### 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.

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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.

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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.

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