

1 **POST TITLE:** Pensions Assistant

2. **POST NUMBER:**

3. **GRADE:** 5  
Job Evaluation Ref: A4335

4. **LOCATION:** Your normal place of work will be at a location to be County Hall. However, you may be required to work at any council workplace within County Durham

5. **RELEVANT TO THIS POST:**

**Flexible Working:** Subject to service needs the council's flexible working policy is applicable to this post

6. **ORGANISATIONAL RELATIONSHIPS:**

The post holder will be accountable to the Principal Pensions Officer

7. **DESCRIPTION OF ROLE:**

The post will involve working in the Pensions Team within Corporate Finance.

To contribute to the provision of an efficient and effective service in relation to the administration of the Local Government Pension Scheme (LGPS).

8. **DUTIES AND RESPONSIBILITIES SPECIFIC TO THIS POST:**

Listed below are the responsibilities this role will be primarily responsible for. You may be required to undertake any of the following tasks:

- Work as part of a cohesive team to provide an efficient and effective pensions service to customers and employees, which includes dealing with a wide range of customer queries.
- Maintain an up to date knowledge of relevant policies, procedures and principles to ensure appropriate advice is given to all employees and managers.
- Carry out calculations relating to a range of pensions related processes, including retirements, transfers and beneficiary payments.
- Providing support in the preparation and input of year end information and Pension Increase and Data Quality exercises.
- Preparing the pensioner payroll submissions and inputting onto the Payroll system.

- Ensuring that timely and accurate pension information is input into the system. Checking data in accordance with documented procedures, ensuring inaccurate or missing data is resubmitted to agreed timescales.
- Ensuring data is used and held in accordance with the Data Protection Act 1998.
- Support the Pensions Officers in the recovery of overpayments in line with the Council's Overpayment Policy, including negotiating with LGPS members, outside organisations or their representatives to obtain agreement to the recovery and raising/checking invoices in relation to overpayment of pension.
- Assisting in the creation and / or timely dispatch of year end information.
- Assisting in the efficient use and development of the UPM Pensions administration system where required.
- Assist in the undertaking of special projects within the team as directed, including research and data collection.
- Be actively involved in continuous improvement projects, team meetings and training as required.
- Demonstrate a commitment to ensure compliance with the authority's Equal Opportunities Policy.
- Ensure that confidentiality and data protection requirements are maintained and adhered to.

All employees have a responsibility to undertake training and development as required. They also have a responsibility to assist, where appropriate and necessary, with the training and development of fellow employees.

All employees have a responsibility of care for their own and others health and safety.

The above is not exhaustive and the post holder will be expected to undertake any duties which may reasonably fall within the level of responsibility and the competence of the post as directed by the Head of Service.

Variation may also occur to the duties and responsibilities without changing the general character of the post.

## **9. COMMON DUTIES AND RESPONSIBILITIES:**

### **9.1 Quality Assurance**

To set, monitor and evaluate standards at individual, team performance and service quality so that the user and the Service's requirements are met and that the highest standards are maintained.

To establish and monitor appropriate procedures to ensure that quality data are reported and used in decision making processes, and to demonstrate through behaviour and actions a firm commitment to data security and confidentiality as appropriate.

### **9.2 Communication**

To establish and manage the team communications systems ensuring that the Service's procedures, policies, strategies and objectives are effectively communicated to all team members.

### 9.3 **Professional Practice**

To ensure that professional practice in the team is carried out to the highest standards and developed in line with the Service's stated objectives of continual improvement in quality of its service to internal and external customers.

### 9.4 **Health and Safety**

To ensure that the Health and Safety policy, organisation arrangements and procedures as they related to areas, activities and personnel under your control are understood, implemented and monitored.

### 9.5 **General Management (where applicable)**

To provide vision and leadership to staff within a specialist team, ensuring that effective systems are in place for workload allocation and management, the application of the Authority's and the Service's policies and procedures, including those relating to equality, supervision and appraisal and all aspects of their performance, personal development, health and welfare.

### 9.6 **Financial Management (where applicable)**

To manage a designated budget (as required) ensuring that the Service achieves value for money in all circumstances through the monitoring and control of expenditure and the early identification of any financial irregularity.

### 9.7 **Annual Professional Development Reviews**

All members of staff will receive Professional Development Reviews (PDR) and it is the responsibility of each member of staff to follow guidance on the PDR process

### 9.8 **Equality and Diversity**

As an organisation we are committed to promoting a just society that gives everyone an equal chance to learn, work and live free from discrimination and prejudice. To ensure our commitment is put into practice we are developing policies, which will seek to remove any barriers to equality of opportunity and to eliminate unfair and unlawful discrimination.

These policies apply to all employees of Durham County Council.

### 9.9 **Confidentiality**

All members of staff are required to undertake that they will not divulge to anyone personal and/or confidential information to which they may have access during the course of their work.

All members of staff must be aware that they have explicit responsibility for the confidentiality and security of information received and imported in the course of work and using Council information assets. The Council has a Personal Information Security Policy in place.

### 9.10 **Induction**

**SERVICE:** Human Resources and Organisational Development

**SERVICE GROUPING:** Resources

The Council has in place an induction programme designed to help new employees to become effective in their roles and to find their way in the organisation.

### Person Specification – Pensions Assistant

|                    | Essential  | Desirable  | Method of assessment   |
|--------------------|--|--|--|
| Qualification      | <ul style="list-style-type: none"> <li>NVQ in Business Administration level 3, or equivalent relevant qualification</li> </ul>   | <ul style="list-style-type: none"> <li>Recognised Pension qualification e.g. IPP certificate or diploma</li> <li>IT qualification e.g. ECDL/CLAIT</li> </ul> | <ul style="list-style-type: none"> <li>Application form</li> <li>Selection Process</li> <li>Pre-employment checks</li> </ul> |
| Experience         | <ul style="list-style-type: none"> <li>Experience in an office environment with either Pensions/Finance or Payroll related duties</li> </ul>   | <ul style="list-style-type: none"> <li>Public sector Pensions/Finance or Payroll experience</li> </ul>   | <ul style="list-style-type: none"> <li>Application form</li> <li>Selection Process</li> <li>Pre-employment checks</li> </ul> |
| Skills/knowledge   | <ul style="list-style-type: none"> <li>Knowledge and understanding of Financial/Pensions or Payroll computer systems</li> <li>Knowledge of Microsoft Office Software packages</li> <li>Numerate</li> <li>Good organisational skills.</li> <li>Good customer service skills</li> <li>Accurate and consistent</li> </ul>   | <ul style="list-style-type: none"> <li>Knowledge of the Local Government Pension Scheme (LGPS)</li> </ul>  | <ul style="list-style-type: none"> <li>Application form</li> <li>Selection Process</li> <li>Pre-employment checks</li> </ul> |
| Personal Qualities | <ul style="list-style-type: none"> <li>Able to communicate with a wide range of people (face to face, telephone, written)</li> <li>Able to prioritise own workload and meet deadlines</li> <li>Able to work flexibly to meet the needs of the service</li> <li>Able to work as part of a team and on own initiative</li> <li>May be required to work outside of normal office hours</li> </ul> |  | <ul style="list-style-type: none"> <li>Application form</li> <li>Selection Process</li> <li>Pre-employment checks</li> </ul> |