CITY OF BRADFORD METROPOLITAN DISTRICT COUNCIL

JOB PROFILE

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| **DEPARTMENT: Chief Executive Office** | **SERVICE GROUP: WYPF Investment Operations** | |
| **GRADE: % of Band 6**    **Age 18 + - Year 1 – 80% pa**  **- Year 2 - 95% pa**  **Subject to age** | **REPORTS TO: Senior Investment Officer** | |
| **GRADE: Apprentice Investment Officer** | | **SAP POSITION NUMBER : 50230099** |

The following information is furnished to help Council staff and those people considering joining the City of Bradford Metropolitan District Council, West Yorkshire Pension Fund to understand and appreciate the general work content of their post and the role they are to play in the organisation. The duties and responsibilities highlighted in this Job Profile are indicative and may vary over time. Post holders are expected to undertake other duties and responsibilities relevant to the nature, level and scope of the post and the grade has been established on this basis.

For posts where employees speak directly to members of the Public the post holder is required to demonstrate their ability to speak fluently in English.

As a candidate you will be expected to demonstrate your ability to meet the qualification standards required for the role by providing evidence in the application form for the purpose of shortlisting. Applicants with disabilities are required to meet the essential special knowledge requirements shown by a cross in the end column of this section.

The employee competencies are the minimum standard of behaviour expected by the Council of all its employees and the management competencies outlined are those relevant for a post operating at this level within our organisation.

Both sets of competencies will be used at interview stage and will not be used for short listing purposes. **Please see the separate guidance information on how to complete the form located on Bradnet.**

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| **Key Purpose of Post** |
| To undertake an Apprenticeship Scheme within the West Yorkshire Pension Fund for which the main purpose of the role is to:-Learn and carry out the Investment Operational administration requirements of a Local Government Pension scheme to oversee and complete the Operational servicing of the assets and cash held for the Pension Scheme.  To participate in the transition project to transition the WYPF Investment Operations services from an LGPS to become and FCA Regulated entity under the Northern Pool. |
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| |  | | --- | | **Main Responsibilities of Post** |   To undertake an Apprenticeship Scheme within the West Yorkshire Pension Fund for which the main responsiblilities of the role are, but not limited to, :-  To assist in the organisation and co-ordination of the daily BAU investment administration requirements for the management of the pension fund assets. To process relevant instructions to ensure that all daily investment activities is updated to the core business systems and that ll rlevant third party service providers are delivering the services required whilst meeting, at minimum, the UK’s regulatory standards for Investment management and customer protection.  To process internal updates to the core business controls, procedures, sytems, etc. as required. To ensure all daily, weekly and monthly tasks and controls are completed within the defined timeframes and to meet core Service Level Agreement standards.  Be able to work to tight deadlines with minimal supervision is expected following training. Support will be available from more experienced Officers and senior staff to support the achievement of this standard.  To assist all other WYPF Investment Operations team members as required to ensure the smooth processing of all investment activities. To perform all tasks and processes in line with the teams procedural requirements. To identify and report on any exceptions or transactional errors in a timely manner, escalating such issue for correction and re-processing to the approrpite person.  To undertake the identified investment qualifications to improve their understanding of the UK Financial Services industry so as to met the FCA core reqiuirement of competency for all investment staff. To ensure they keep up to date with all changes to the internal controls and policy guidelines as well as any changes to the FCA regulatory standards impacting on WYPF.  Liaise with and provide limited advice to all internal team members as well as our service providers as required to ensure the smooth operational of the daily business.  To assist in any project work impacting the WYPF Investment teams to deliver new systems, procedures, policies. To act in the best interests of the firm at all times by ensuring they meet all ethical and integrity defined requirements of an FCA regulated entity staff member.  Undertake any relevant tasks and roles as required on an ad-hoc basis when requested by an appropriate person which may mean a transfer of role to another Investment Operations team to develop new skills and/or support the team during periods of staff absence, such as annual leave.  To liaise with all other WYPF teams including the Investment Managers and Finance teams as part of their daily BAU performance as well as to provide them with updates and support to assist in them achieving their daily, weekly and monthly tasks.  Understands the requirement for confidentiality and protection of our clients and business relationships and report any potential requests for information from non-approved persons. | | | |
| **Structure:** | | | |
| **Special Knowledge Requirement.** | | | |
| **Applicants with disabilities are only required to meet the essential special knowledge requirements shown by a cross in the end column**. | | |  |
| Due to the Governments Fluency in English Duty for posts where employees speak directly to members of both internal teams and external service providers, the postholder is required to meet  the Advanced Threshold level which will be implemented  a) Can express themselves fluently and spontaneously, almost effortlessly | | | X |
| Can show demonstrable experience of working within a team structure whether this be as a core team member and/or as a team leader. This can be in a working or social environment. | | | X |
| Uses a range of basic IT packages such as Microsoft Word and Excel | | | X |
| Able to deal with internal and external parties whether communicating face to face, over the telephone, via Teams or via email. | | | X |
| Demonstrates a high level of numeracy, literacy and accuracy across a range of activities | | | X |
| **Relevant experience requirement** | | | |
| Able to operate office equipment e.g. telephone, photocopier, fax etc. **and** completes clerical and administrative work with accuracy and attention to detail in a timely manner. | | | |
| **Relevant professional qualifications requirement** | | | |
| A range of GCSE subjects, must include Maths and English, at Grades A-C or be able to demonstrate good literacy and numeracy through assessment before and during interview. | | | |
| **Core Employee competencies to be used at the interview stage.** | | | |
| **Communicates Effectively** | | | |
| Able to use effective spoken and written communication skills required and is a feature of the role. It includes exchanging information/building relationships; giving advice and guidance and handling private, confidential and sensitive information**.** | | | |
| **Carries Out Effective Decision Making** | | | |
| Covers a range of thinking skills required for taking initiative and independent actions within the scope of the job. It includes planning and organising, self effectiveness and any requirements to quality check work. | | | |
| **Undertakes Structured Problem Solving** **Activity** | | | |
| Covers a range of analytical skills required for gathering, collating and analysing the facts needed to solve problems. It includes creative and critical thinking; developing practical solutions; applying problem solving strategies and managing interpersonal relationships. | | | |
| **Operates with Dignity and Respect** | | | |
| Covers promoting equality, treating all people fairly and with dignity and respect, maintains impartiality/fairness with all people. | | | |
| **Working Conditions:** | | | |
| Must be able to perform all duties and tasks with reasonable adjustment, where appropriate, in accordance with the Equality Act 2010 in relation to Disability Provisions. | | | |
| **Special Conditions:** | | | |
| You will be informed if there is a requirement for the post to have recruitment checks  such as DBS, Warner Process.  The apprentice will follow a programme of training relating to the role and achieve the appropriate skills, competencies and qualifications of the role by the end of the training programme.  **To meet the apprenticeship funding requirements, you must be entitled to work in**  **the UK and have been a resident for 3 years.**  **Please note** that if a candidate possesses a qualification at the same level or at a higher level in the same specific subject area as the advertised apprenticeship the candidate would not be eligible for apprenticeship funding and therefore must not apply. If unsure please enquire.  The Apprentice will train to Investment Officer standard at Level 7.  The Apprentice must achieve the full apprenticeship framework and qualification by the end of the apprenticeship. | | | |
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| **Compiled by: P. Clarke**  **Date: 27/05/25** | **Grade Assessment Date:22/04/2025** | **GRADE: Band 6**  **Starting from Band 6, Scale Point 8 - 10** | |