**Role Profile**

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| **Reference Number** | **TO BE COMPLETED BY JEGS** | |
| **Role Title** | Head of Service Delivery | |
| **Directorate** | Chief Executive | |
| **Service Area** | West Yorkshire Pension Fund | |
| **Reports to** | Assistant Director (Finance, Administration and Governance) | |
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| **Role Purpose** |
| 1. To assist the Director and the Assistant Director – Finance, Administration and Governance in the provision of a high quality administration service at a low cost. 2. Provide leadership and direction and lead, plan, and develop, the Service Centre functions to deliver the administration service for WYPF and its partners and clients, ensuring compliance with all regulations (HMRC and MHCLG), overriding legislation and the requirements of the Pensions Regulator. 3. To advise and guide the senior management team to deliver the vision, values and objectives of the WYPF within the Service Centre. 4. As part of the Senior management team, ensure delivery of WYPF key business plans, and Service Centre requirements from other sections. |

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| **Accountabilities** |
| **Operations**  • To positively support and deliver the vision, values and strategic objectives of the Pension Fund by providing constructive and timely advice on Service and Contact Centre systems and processes.  • To make a significant and sustained contribution to developing and integrating the continuing change required to ensure the Pension Fund remains a high service low cost provision.  • To ensure Service Centre systems are fully compliant with all legislative requirements, and take account of the requirements of the Pensions Regulator.  • Develop and maintain working relationships with top management, other senior officers and their services, other Pension Funds, service providers, external agencies, elected members and peer groups working corporately and cooperatively to ensure the service is at the forefront of innovation and change.  • Develop and maintain services for partners to ensure all their requirements are met, exceeding the agreed standards.  • Develop and maintain systems to minimise fraud risk, including working with national agencies, auditors,legal advisors and other service providers.  • Represent and promote the Pension Fund at appropriate local, regional and national forums and maintain and develop working relationships with professional bodies and other groups to ensure effective representation and promote meaningful networking.  • Actively seek continuous improvement in the performance and development of the Service and Contact Centres, facilitate best value in service delivery and support the maintenance of the ISO 9001 and ISO 27001 accreditation.  • Act as an ambassador for the Pension Fund by showing professionalism, high personal standards of integrity and courtesy at all times. Promote this culture throughout the organisation.  **People**  • Promote fairness and inclusion across all service provision and employment through personal example, open commitment, clear action and direction.  • Responsible for carrying out staff appraisals including the implementation and monitoring of staff training and development plans and appraisal targets.  • Performance management of principal officers through coaching and mentoring to promote high quality learning and development of staff, assisting with career progression and continuous service improvement.  • Responsible for the welfare, health and safety and discipline of staff, ensuring corporate standards are met; management of sickness absence being a key priority.  **Principal Accountabilities – Specific**  1 Responsible to the Assistant Director – Finance, Administration and Governance, working within broad policy guidelines and objectives with a significant degree of discretion and delegated authority. The seniority of the post is such that the post holder is required to demonstrate initiative, political awareness, professionalism, managerial and technical competence in carrying out the functions of the post, referring matters to the Assistant Director or Director of WYPF only by exception.  2 Deputise for Assistant Director – Finance, Administration and Governance as required, including attending meetings on their behalf.  3 Regularly prepare and present appropriate reports to senior management and the Joint Advisory Group (JAG), Investment Advisory Panel (IAP), Pension Board and Corporate Governance and Audit Committee as required.  4 Lead and manage in key areas of activity:  **Service Centre Administration**  Oversee and direct the administration, including remote sites, for all clients including:   * Maintain personal records, including employment history and remuneration for all members * Manage and develop the UPM system to ensure accuracy and full compliance with legislation * Ensure the high performance, quality and consistency of service delivery is maintained, and in accordance with the latest developments in the pensions industry.   **Service Centre Benefit Payments (payroll)**  Oversee and direct the pension payments for all clients (see job dimensions), including:   * Monthly LGPS and Fire payrolls * Daily LGPS Payrolls and payments, including lump sums, death grants and transfers * Daily Fire Payrolls and payments, including lump sums, death grants and transfers * Liaison with HMRC in relation to taxation of benefit payments.   **Contact Centre**  Oversee and direct the communications and contact centre facility and services for the pension fund to serve all scheme members (retired, current and deferred and their dependants) to deal with:   * General pension scheme enquiries by telephone, e-mail or personal visits * Requests for, and explanations of, detailed calculations and legislative information to explain in simple and understandable terms for members of the scheme * Notifications of deaths of members and information for dependants and families and guidance for them * Enquiries of pension payments and P60’s * Enquiries of annual benefit statements and deferred benefit statements * Receipt and scanning of all incoming mail and documents and its distribution, and dealing with outgoing post |

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| **Knowledge / Skills / Experience required** |
| A relevant degree or a recognised pensions qualification (APSA, CIPP, PMI) or management qualification.  Demonstrable recent and continuing professional and personal development.  Extensive experience of working in a pensions environment at a senior management position in a large, complex organisation.  Substantial proven leadership and a record of successful management at a senior level within a multi-disciplinary public or private sector organisation. Includes having gained experience of participation in, and successful contribution to, the strategic decision making process of a large multi-disciplinary organisation.  Senior managerial experience of successful resource management, and the delivery and measurement of cost effective, quality services.  Experience of working effectively within a political environment as well as evidence of developing, implementing and monitoring clear standards of performance and service delivery outcomes.  A successful record of managing change in a large multi-disciplinary organisation including developing, leading and implementing strategies and initiatives.  Experience of working collaboratively with other pension funds and partners in promoting and strengthening partnership working. |

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| **Dimensions of role (direct/ indirect as applicable) eg total number of staff managed/ total budget/ total scope of role** |
| Responsible for:-   * Pensions payroll over £750m per annum (130,000 pensioners) for three LGPS clients and 23 Fire & Rescue Authorities * Administration of records for over 400,000 members (WYPF total liabilities £13,000,000,000) * Staff budget over £3.5m per annum |

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| **Structure Chart (role of direct reports)** | |
|  | Assistant Director  Member Services Manager  (Retirements)  P05/6  Member Services Manager (Early Leavers/Estimates)  P05/6  Member Services Manager (Linkings)  P05/6  Member Services Manager (Contact Centre)  P05/6  Member Services Manager(Transfers & Current Member)  P05/6  Pensioner Services Manager (LG)  P06  Payroll Services Manager  P06  Team Manager  FTE  P03  Senior Pensions Officer  9 FTE  Band 8-S02  Pensions Officer  8 FTE  Band 5-8  Team Manager  FTE  P03  Senior Pensions Officer  6 FTE  Band 8-S02  Pensions Officer  8 FTE  Band 5-8  Team Manager  FTE  P03  Senior Pensions Officer  4 FTE  Band 8-S02  Pensions Officer  6 FTE  Band 5-8  Team Manager  FTE  P03  Senior Pensions Officer  2 FTE  Band 8-S02  Pensions Officer  14 FTE  Band 5-8  Team Manager  FTE  P03  Senior Pensions Officer  6 FTE  Band 8-S02  Pensions Officer  6 FTE  Band 5-8  Team Manager  FTE  P03  Senior Pensions Officer  5 FTE  Band 8-S02  Pensions Officer  5 FTE  Band 5-8  Team Manager  FTE  P03  Senior Pensions Officer  4 FTE  Band 8-S02  Pensions Officer  4 FTE  Band 5-8  Head of Service Delivery  Continuous Improvement Manager  X2  P04 |
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| **Key benchmarked competencies, traits and motives required to successfully deliver the role (not required for JE. Informs recruitment, succession planning, development and performance management** | |
|  | Carries out the working practices, procedures and basic operations across a specialist and complex area or number of specialist areas taking account of current pensions and overriding legislation.  Uses specialist knowledge of health, safety and environmental policies, procedures and regulations, including risk in own area and/or across other areas of work including extensive knowledge of all aspects of pension, payroll and overriding legislation.  Uses a range of specialist ICT systems across own work area and or across other areas of work.  Oversees a budget, keeping costs within agreed levels for own department and contributes to Corporate savings.  Uses, interprets, analyses and communicates complex information from a variety of sources, on a regular basis.  Works on own initiative within broad policy guidelines and objectives with a significant degree of discretion and delegated authority. Planning heavy workloads from a variety of sources whilst working under time constraints.  Ability to investigate complaints / requests and demonstrate a high level of initiative, strong analytical and problem solving skills.  Ability to act on matters of professional judgement relating to the Service Centre group; Senior Management team decisions and the re-engineering of business processes.  Liaises regularly with senior managers, project directors, senior officers and external bodies and agencies, providing professional information and advice.  Demonstrate understanding of quality management, quality assurance, quality standards, compliance audit and safety assessments.  Understand the nature of risk and control and fraud, and the impact of these on business. |