

DERBYSHIRE COUNTY COUNCIL
CABINET MEMBER FOR COUNCIL SERVICES

31 May 2016

Report of the Strategic Director of Corporate Resources

**PROPOSED CREATION OF NEW PROJECT MANAGER (PENSION FUND)
POST IN THE PENSIONS ADMINISTRATION TEAM FOR A FIXED TERM
OF 2 + 1 YEARS**

1 Purpose of the Report

To seek approval for the establishment of a new, 2 + 1 year fixed term Project Manager (Pension Fund) post, in the Derbyshire Pension Fund pensions administration team

2 Information and Analysis

Derbyshire Pension Fund implemented a new pensions administration system on 1.12.14. The Fund originally used the Axis system provided by Heywood and switched to Civica's UPM system. There were three main parts to the contract with Civica; the operational UPM system that holds the data, performs the calculations etc., a self-service on-line facility for use by Fund members and Fund employing authorities, and an interface with the County Council's SAP system to enable automatic updating of the pensions payroll. All stages were originally planned to be completed by July 2015. However, a combination of factors, including the limited resource that the Pensions Fund has thus far been able to contribute to the project, have meant that by April 2016, 60% of the first stage was complete and the further stages had yet to make any notable progress.

Work is ongoing with Civica, and with the other UPM users, to make progress. However, the business side of the project has been led by one Team Leader in the Pensions team alongside her substantive role. Further to this, the substantive role has been growing too, and is set to continue to expand further over the coming months.

It is, therefore, recognised that the resource allocated to this project is not sufficient on the business side. Furthermore, the passage of time, as well as developments in the wider world, has meant that some fundamental aspects of the original project require review. Therefore it is proposed to create a fixed-term, full time UPM Project Leader post, distinct from the permanent establishment, and reporting direct to the Pensions Manager. The postholder

would be responsible for reviewing the project plan, re-positioning the project as appropriate in negotiation with Civica, and driving the updated project plan to completion, thereby contributing significantly to the development of the Pension Fund's ongoing systems and communications strategies. The Team Leader post will return full time to its substantive duties.

The contract with Civica is to be either extended or terminated on 30 November 2018. The decision on this is required to be notified to Civica 180 days ahead of this date. It is proposed, therefore, to fix the term of the proposed post at 2 years to complement this timetable, with the option of an extra year depending on the position at the time. If, for example, it was decided to re-procure, the postholder would have all the skills and knowledge necessary to oversee the migration of data from UPM to an alternative system.

The proposed role is key to the success of Derbyshire Pension Fund in meeting the goals of its 3 year plan and achieving its vision of improvement.

3 Financial Considerations

The post has been job evaluated as Grade 11, (£30,181 level 36 to £33,154 level 39). It will be funded from the Pension Fund budget, so will have no impact on the County Council's plans to achieve savings. The total cost over the maximum three year period will be £114,753.48, including 22.71% on-costs.

4 HR Considerations

The proposed structure, subject to Cabinet approval, will be consistent with the Council's Organisational Design Principles and will enable and support service delivery. The role will report into the Finance Manager G14 as the most appropriate reporting line, but it is not a successor role.

The proposed new structure has been subject to job evaluation and grading levels have been confirmed in line with the HAY job evaluation scheme.

The Job and Person Profile is attached at **Appendix A**.

The proposed organisation structure is attached at **Appendix B**.

The recruitment and selection process for the post will be in line with Derbyshire County Councils policies and procedures.

5 Other Considerations

In preparing this report, the relevance of the following factors has been considered; legal, prevention of crime and disorder, equality of opportunity, environmental, health, property and transport considerations.

6 Key Decision

No.

7 Is it necessary to waive the call-in period?

No.

8 Officer's Recommendation

That approval be given to add the Project Manager (Pension Fund) post to the establishment of the pensions administration team.

JUDITH GREENHALGH

Strategic Director of Corporate Resources

JOB PROFILE

Job Title:	UPM Project Manager	Ref: DCC/16/
Department:	Corporate Resources	Service: Pensions
Job Family:	Business and Public Services	Job grade:
Benchmark ref:		

Purpose of this role:

- Review, develop and maintain the strategic use of the UPM (Universal Pensions Management) Pensions Administration System within the Pension Fund's operating model
- Produce, detailed analysis and costed recommendations for the future systems strategy of Derbyshire Pension Fund.
- Contribute to the management of the Derbyshire Pension Fund as a key member of the management team

Key relationships:

The postholder will:

- Report directly to the Finance Manager (Pensions)
- work with and advise the Finance Manager (Pensions) and Team Leaders in the determination of system needs, the exploration of opportunities, and the development and implementation of tested solutions
- work directly with the third party suppliers' managers and technical staff on developing solutions and drive the progress of the UPM implementation project
- work directly with Transformation colleagues on technical and complex matters around systems architecture, access, licensing etc.
- work directly with Transformation and SSC colleagues on the development of the interface between UPM and SAP
- advise the Transformation Project Manager on operational matters and decisions around payments to the supplier
- benchmark/liaise with Pensions and IT contacts at other LG Pension Fund authorities and chair the Civica UPM Technical User Group which comprises twelve members from different local authorities as well as senior managers from Civica UK
- manage and direct the project team
- contribute to the management of Derbyshire Pension Fund as a member of the management team

Key result areas include:

- Leading on the completion of the UPM implementation project within agreed timescales and within budget, including the delivery of an independent website and an interface with SAP to maximum possible benefits realised in terms of business efficiency
- Making the major contribution to the development of the Pension Fund's systems and communications strategies
- Produce costed recommendations for the Director of Finance and the Pensions and Investments Committee, regarding the future systems strategy of Derbyshire Pension Fund, by March 2018,
- Establishing and maintain good relationships with all stakeholders
- Reviewing and managing the project to ensure that value for money is achieved
- Establishing robust processes and regimes, and leading the thorough testing and implementation of new releases and calculation drops, ensuring that all changes are delivered in a coordinated way with the users
- The provision of timely and accurate information, advice, training and guidance notes to the Pensions team members, ensuring optimal use of the system and accurate pension calculation outcomes
- The provision of timely and accurate information, advice, training and guidance notes to 160 employing authorities and 90,000 Fund members
- Produce regular progress reports to the Project Board
- Maintain, analyse and report on relevant statistical data, and generating recommendations to inform service development and support decision making
- Adhering to internal controls and protocols while carrying out all tasks, including the maintenance of confidentiality of commercially sensitive and personal data
- Manage the work of the dedicated staff resources on the project team and that of the supplier's staff when on the premises

PERSON PROFILE

Job Title: UPM Project Manager

Ref: DCC/16/

Department: Corporate Resources

Service: Pensions

Job Family: Business and Public Services

Job grade:

Benchmark ref:

	Essential	Desirable	Evidence
Experience	<p>Use of computerised systems including Project, Word, Excel, Access and Powerpoint</p> <p>Substantial experience of systems project management and successfully working to deadlines</p> <p>Experience of writing SQL reports</p> <p>Experience of business process re-engineering</p> <p>Demonstrable experience of developing and configuring the Civica UPM system</p> <p>Experience of working with other pensions administration systems</p> <p>Experience of managing the migration of bulk data</p>	Experience of public sector procurement	App form, interview

	<p>between different systems</p> <p>Experience of successfully building and managing credible stakeholder relationships with senior managers and staff from various organisations to achieve results</p> <p>Experience of managing third party software suppliers with a focus on technical infrastructure</p> <p>Experience of working with Council Members</p>		
Skills and knowledge	<p>Detailed knowledge of the Local Government Pension Scheme and administration processes</p> <p>Detailed knowledge of the Civica UPM system and of systems development</p> <p>The ability to interpret very complex legislation and communicate it in a clear way to various audiences</p> <p>Client relationship management</p> <p>Proven large scale project management skills</p> <p>Proven ability to</p>	Knowledge of payroll systems	App form, interview, testing

	<p>manage staff to meet performance targets and planned objectives</p> <p>Ability to change priorities at short notice, manage impact and expectations in an IT projects environment</p> <p>Knowledge of local government policies, procedures and associated EU directives</p>		
Personal Effectiveness	<p>Creative, with an analytical approach to problem-solving/influencing change</p> <p>Flexible with a positive approach to driving forward change</p> <p>Commercial judgement and acumen, particularly relating to contract management</p> <p>Effective communicator and presenter of potentially complex issues, orally and in writing to a range of audiences</p> <p>Political awareness</p> <p>Ability to lead and motivate a team and others</p> <p>Ability to establish credibility with elected Members, directors</p>		App form, interview, testing

	and partners		
Qualifications	<p>Relevant degree or equivalent qualification or equivalent experience</p> <p>Appropriate IT / systems development qualifications</p> <p>Five years plus management experience</p> <p>Prince 2 or similar qualification in Project Management methodology</p>		