

**Agenda Item No.6 (c)**

**DERBYSHIRE COUNTY COUNCIL**

**CABINET**

**2 February 2016**

**Report of the Strategic Director of Corporate Resources**

**PROPOSED CREATION OF A NEW 'BUSINESS SERVICES OFFICER'  
POST IN THE PENSIONS ADMINISTRATION TEAM FOR A FIXED TERM  
OF 3 YEARS  
(COUNCIL SERVICES)**

**1 Purpose of the Report**

To seek approval for the establishment of a new, 3 year fixed term post, entitled 'Business Services Officer', in the Derbyshire Pension Fund pensions administration team

**2 Information and Analysis**

The pensions industry generally, and the Local Government Pension Scheme (LGPS) in particular, is going through a period of unprecedented change. This is in terms of increased operational complexity, but also greater scrutiny and more robust governance arrangements. It has been identified that, as well as requiring more resource focussed on the core business of calculating and paying pensions, the pensions administration team also needs an injection of certain new skills to enable it to meet its statutory requirements over the coming years and to demonstrate compliance with the requirements of the Pensions Regulator, the national body that oversees standards in the pensions industry.

The specific factors that have led to the development of the proposed post of 'Business Services Officer' are as follows:

- The fundamental changes to the LGPS from April 2014, as well as those resulting from Freedom and Choice legislation and successive government budget statements, have increased the complexity of the scheme and the workload and, therefore, the need for a constantly developing staff training program
- Clarity around some of the 2014 regulations was not supplied until well into 2015, meaning that large backlogs of certain areas of work are being managed within the existing resource

- The changes to the LGPS have been particularly challenging for employing authorities, upon whom the Pension Fund depends for timely, accurate information. This has resulted in the vast majority of the local government Pension Funds in England and Wales missing the statutory target for the production of Annual Benefit Statements.
- While the Pensions Regulator accepts that 2015 was an exceptional year, it expects to see improvement/recovery in 2016; and that includes Derbyshire Pension Fund being able to demonstrate that we have done everything we can to ensure employers are aware of their responsibilities
- The issues at Derbyshire Pension Fund are further exacerbated by the switch to a new pensions administration system, which is taking longer than anticipated to bed in, causing further delays, errors and backlogs, as well as impacting on staff morale
- Attempts in the last six months to attract people with LGPS skills and knowledge to the team, have met with limited success. The team continues to record over 100 hours of overtime each month.
- There is also new work coming next year in the form of two major projects, GMP Reconciliation and Triennial Valuation, as well as the need to develop the Pension Fund's new website and interactive, self-service facilities for employers and Fund members

The proposed new post, therefore, will be required to take on some existing duties from Team Leaders whose workloads have expanded in relation to the above, and also to take on projects and tasks that don't necessarily require an LGPS background to be completed successfully. This will help to take away some of the distractions from the specialist pensions staff, enabling them to focus fully on the backlogs and on developing their skills and knowledge at the pace required to match the current rate of change.

In terms of new work, the postholder will lead on developing the new Derbyshire Pension Fund website, sourcing and facilitating training for internal staff and employing authority contacts, and working with employing authorities to ensure that they are carrying out their LGPS responsibilities promptly and accurately.

Notwithstanding any further fundamental legislative changes, it is planned that, by April 2019, Pension Fund administration activity will be in a stable state. Therefore, this post is being proposed for a fixed term of 3 years, and it represents an important part of the Pensions administration team's 3 Year Plan.

### **3 Financial Considerations**

The post has been job evaluated as Grade 9. It will be funded from the Pension Fund budget. The total cost over the three year period will be £87,087 including 20% 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 post has been subject to job evaluation and the grade has 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 Business Services Officer post to the establishment of the pensions administration team.

JUDITH GREENHALGH

Strategic Director of Corporate Resources

## JOB PROFILE

<b>Job Title:</b>	Business Services Officer	<b>Ref:</b> DCC/15/
<b>Department:</b>	Corporate Resources	<b>Service:</b> Pensions
<b>Job Family:</b>	Business and Public Services	<b>Job grade:</b>
<b>Benchmark ref:</b>		

### **Purpose of this role:**

- To source, coordinate and administer induction, training and development around the Local Government Pension Scheme (LGPS) for;
  - a. Derbyshire Pension Fund (DPF) employees
  - b. DPF employing authorities
  - c. HR/Payroll providers to DPF employing authorities
- To support the 160 scheme employing authorities within the Derbyshire Pension Fund to a) comply with the requirements of the Pensions Administration Strategy and b) deliver the annual Communications Strategy in each location
- To maintain and develop the Derbyshire Pension Fund on-line presence, and to lead the project to register employers and Fund members as self-service users
- To act as first point of contact for potential and new employers as well as established employer authorities

### **Key relationships:**

- The postholder will report directly to the Pensions Manager
- Team Leaders and other DPF colleagues, including the Investments Officer
- Key contacts at 160 employing authorities across Derbyshire
- Contacts at other LG Pension Funds in England & Wales
- Training providers
- Local Government Association LGPS contacts

### **Key result areas include:**

- Supporting the Pensions Manager with the development and implementation of a continually improving Pension Fund Communications Strategy
- Maintaining training and development records for DPF staff
- Maintaining internal training notes and manuals
- Sourcing, procuring, coordinating and facilitating training and related events for DPF employees, employing authorities and Fund members
- Identifying and providing training solutions to support specific projects as required

- Ensuring that training statistics and achievements are recorded and reported to the Pensions and Investments Committee and/or Pension Board as appropriate.
- Maintaining and developing the Employer Database to be the comprehensive source of all employer information, from contacts and authorised signatories to bond and guarantor details
- Managing requests for admission to the Pension Fund from academies and other potential new employing authorities, including the preparation of Pension and Investment Committee reports and the development and implementation of policy in this area of Pension Fund activity
- Maintaining, designing / re-designing and developing DPF's on-line presence in a professional, user-friendly and efficient way, ensuring that Fund members and employing authorities have access to up-to-date information and guidance
- Facilitating the communication of sometimes complex issues and information between DPF and its employing authorities and Fund members
- Ensuring that DPF's on-line and self-service facilities are developed and promoted in such a way as to encourage maximum use by employing authorities and Fund members
- Supporting employers with the switch from annual to monthly contribution returns, ensuring that the switch is made for as many employers as possible as speedily and seamlessly as possible
- Arranging and carrying out site visits with employers to ensure compliance with requirements, progress with developments and get key messages across
- Maintain and develop the Fund's 'Pensions Administration Strategy', and to monitor both the Fund's and the employers' performance against the service standards, escalating or resolving major issues as they arise
- Liaising with other Pension Funds, the LGA Communications team, the Prudential and other partners and third parties to ensure that DPF is applying best practice and is taking advantage of collaborative opportunities in the areas of training and communication
- Developing and managing consultation and feedback channels from employers and Fund members in order to continually improve the services offered and the efficiency achieved
- Leading on quality assurance initiatives
- Leading on other related projects and tasks as required by the Pensions Manager

**General Responsibilities:****People Management**

Instruct and guide colleagues in the distribution and conduct of work in the team.

**Equality and Diversity**

Act in accordance with the authority's Equality and Diversity policy.

***For recruitment purposes only***

***Date:***

**Health and Safety**

Ensure own compliance with authority's Health & Safety policy/procedures and that of any resources you have responsibility for.

**Risk Management**

Contribute to risk awareness in carrying out your duties and raise issues where appropriate.

## PERSON PROFILE

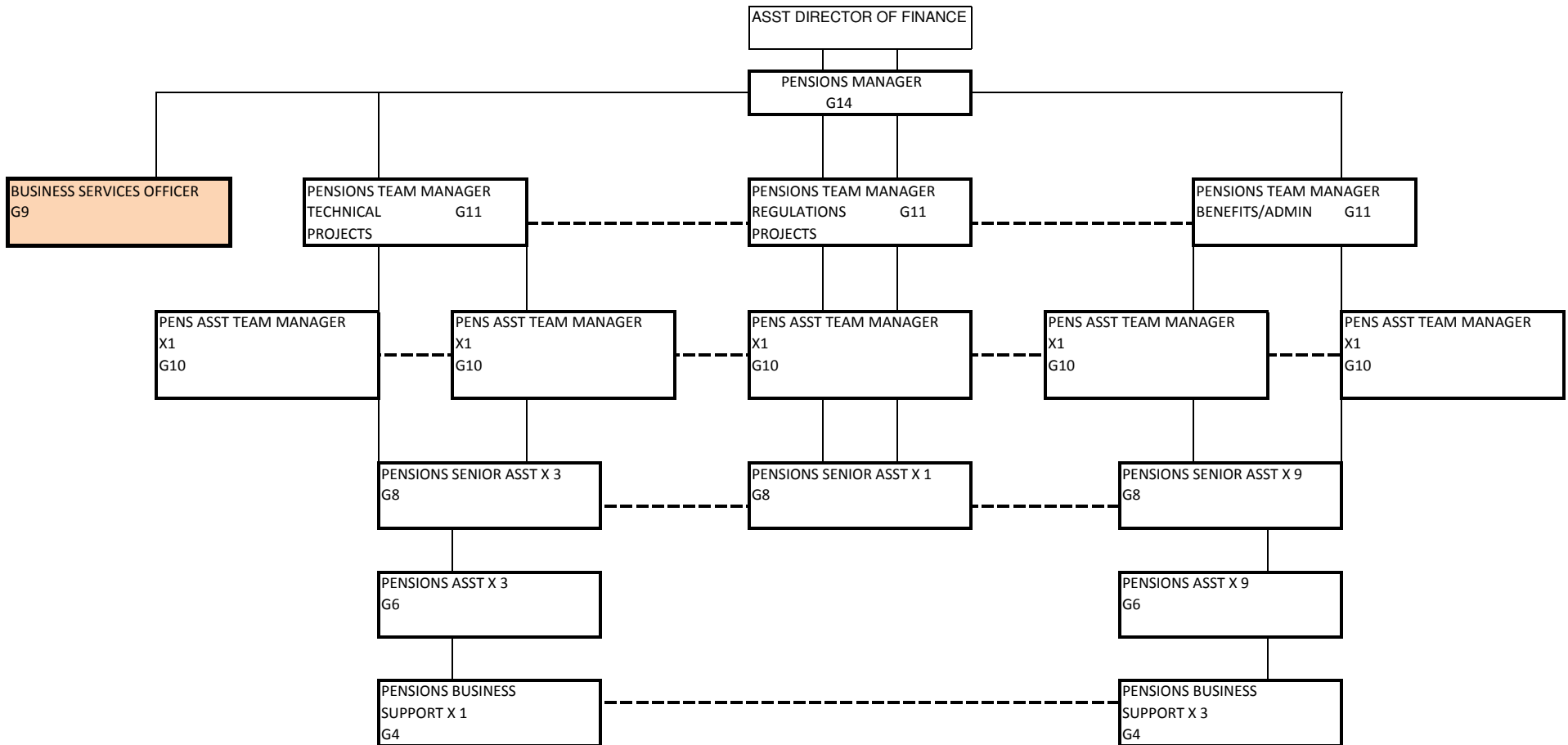
**Job Title:** Business Services Officer      **Ref:** DCC/15/  
**Department:** Corporate Resources      **Service:** Pensions  
**Job Family:** Business and Public Services      **Job grade:**  
**Benchmark ref:**

	Essential	Desirable	Evidence
<b>Experience</b>	Use of computerised systems  Experience of communications or marketing work  Client management or liaison experience  Experience of presenting to audiences of various sizes  Experience of successfully working to deadlines	Experience of training administration  Experience of pensions, HR or finance administration  Event management  Website design  Desktop publishing  Experience of quality assurance schemes / initiatives	App form, interview
<b>Skills and knowledge</b>	Customer focussed  Extremely effective communicator, orally and in writing  Strong negotiation, persuasion and interpersonal skills  Extremely competent in the use of Word, Excel, Access and Powerpoint  Administrative	Knowledge of the LGPS  Knowledge of payroll systems  Knowledge of HR practices and principles	App form, interview, testing

	organisational skills  Understanding of Plain English principles and application  Ability to prioritise to hit targets		
<b>Personal Effectiveness</b>	Outgoing and proactive  Creative, with an imaginative approach to problem-solving  Self-motivated with the ability to work effectively alone  Flexible with a positive approach to change  Ability to quickly grasp and explain complex issues		App form, interview, testing
<b>Qualifications</b>	General education to at least A level or equivalent, and specifically in English Language  A media related qualification  Clean driving licence	Educated to A level or equivalent in Maths	



PROPOSED STRUCTURE December 15



----- Move across teams  
as required

\* Teams to work together on Projects

\*\*Excludes Pensions Business Support Colleagues from the totals

Will take time for this revision to be completed whilst the Civica Project continues