

**JOB DESCRIPTION AND PERSON SPECIFICATION**  
**– PENSION BENEFITS SENIOR OFFICER**

**Title of post:** Pension Benefits Senior Officer - Member Services

**Grade:** Grade F

**Responsible to:** Pension Benefits Team Manager

**Purpose of Post:** To carry out the tasks needed to administer LGPS pensions on a day-to-day basis. To calculate pension benefits correctly and ensure they are paid on time and in line with expectations. To keep GMPF members informed about their benefits and provide information to them about any choices they have. To supervise the Pension Benefits Officers and Assistants within the team and monitor workloads, appraise output and provide support to all team members.

**Main Duties & Key Responsibilities:**

**1. To supervise Pension Benefits Officers**

- Be responsible for monitoring the workloads and output of one or more Pension Benefits Officers and Assistants and for reviewing and appraising their work
- Provide instruction and advice to those Pensions Benefits Officers and Assistants in order to assist them in completing their casework correctly and on time
- Act as a mentor to all new Pensions Benefits Officers and Assistants assigned to you and ensure any induction plans and initial training requirements are completed in conjunction with your Team Manager
- Be responsible for providing, arranging and reviewing their ongoing training needs and, together with your Team Manager, identify ways in which you can help them to develop and progress in their role
- Be responsible for the day-to-day cover arrangements on team, in conjunction with your fellow Senior Pensions Benefits Officers, and ensure any office policies and procedures are followed and adhered to
- Provide cover and support for other Senior Pensions Benefits Officers and your Team Manager whenever required
- Assist with recruitment, adherence to the managing attendance policy and any similar tasks, as and when required
- Recognise good practice, effort and exceptional performance demonstrated by members of your team

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**2. To be responsible for the work of your team, the calculation of pension benefits and completion of your own workload**

- Support your Team Manager in delivering the objectives set for the Members Services section and assist in predicting and anticipating future workloads in order to manage them effectively
- Assist your Team Manager in determining workload priorities and communicate those priorities and their expected completion times to your team members
- Allocate sufficient and appropriate work to your team members and, in conjunction with your Team Manager, undertake regular reviews of all work completed on the team to ensure the quality of work produced meets the required statutory and in-house standards
- Provide information for management reports and produce statistics on your team's work, as required
- Be responsible for managing and monitoring your own workloads and complete tasks allocated to you within the allotted timescales
- Calculate pension benefits, in line with the statutory regulations and following your team's standard procedures, and check work completed by others
- Be jointly responsible for ensuring all pension benefits calculated by your team are done so on time and within the agreed performance targets
- Update pension member records where required and ensure the information recorded is accurate and up-to-date
- Ensure any queries relating to member data or benefit entitlements are immediately investigated and rectified if necessary
- Ensure pension members are provided with accurate and relevant information about their benefits and about any options or choices they have
- Communicate pension information to members or other stakeholders effectively by telephone, letter, e-mail or face-to-face
- Assist and provide support to members of your team or other teams with any unusual or high priority casework
- Ensure compliance with all legal and policy requirements, such as data protection requirements, IT security policies and similar
- Assist with testing new pension software releases and new developments as and when required
- Contribute to the delivery of all projects being carried out affecting your team and be responsible for completing your allocated tasks to the highest standard

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**3. To be responsible for your own self-development and contribute to the overall success of the service**

- Maintain your own working knowledge of the LGPS and any other relevant legislation needed to carry out your role
- Be responsible for assessing your own training needs and feeding this back to your Team Manager, and identify ways in which you might want to develop and progress in your role
- Be jointly responsible for all team training manuals and guidance notes, ensuring they are kept accurate and up to date
- Assist with ensuring your team prioritises customer outcomes and focuses on delivering high standards of service and ensure all procedures relating to customer feedback are followed
- Identify improvements to the service provided to GMPF members and liaise with your Team Manager to appraise and implement these
- Promote a culture of openness, inclusiveness, positivity, inventiveness and ingenuity

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<b>PERSON SPECIFICATION REQUIREMENTS</b>	<b>Essential (E) or Desirable (D)</b>	<b>How it will be assessed</b>
<b>1. Education Standard / Qualifications</b>		
Practical ability in written English and Mathematics to GCSE grade A to C or equivalent	D	Application form
Qualification in pensions, payroll or similar administrative discipline	D	Application form
<b>2. Knowledge</b>		
A knowledge of the LGPS or other pension scheme(s)	D	Application form, Interview
An awareness of Data Protection legislation and its implications and importance for our service	E	Application form, Test, Interview
<b>3. Experience of:</b>		
Calculating pension benefits and entitlements, or work of a similar complexity	E	Application form, Interview
Processing casework and keeping members / clients / customers informed of progress	E	Application form, Interview
Managing your own workloads and working to deadlines	E	Application form, Test, Interview
Resolving customer complaints and applying learning from feedback	E	Application form, Test, Interview
Working effectively as part of a team and setting short and medium term objectives	D	Application form, Interview
Allocating work to others and monitoring their progress and performance	D	Application form, Interview
Providing advice, guidance and training to others and assisting with team development	D	Application form, Interview
Implementing new practices and procedures successfully	D	Application form, Interview
Producing and collating management information, data and statistics	D	Application form, Interview
Assisting with recruitment and supporting attendance management policies	D	Application form, Interview

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<b>4. Skill and ability to:</b>		
Calculate pension benefits and perform manual calculations	E	Test
Identify processing or calculation issues and investigate them	E	Test
Interpret complex information and respond to queries about pension regulations or legislation	E	Test, Interview
Write clear, concise letters and e-mails	E	Test
Talk confidently to members on the telephone and be able to explain complex rules or processes in a clear and appropriate way	E	Application form, Interview
Communicate well with a range of audiences including colleagues, senior managers and outside agencies	E	Application form, Test, Interview
Recognise where issues need to be treated confidentially	E	Test, Interview
Demonstrate empathy and deal appropriately with members experiencing bereavement or similar	E	Test, Interview
Supervise and mentor others, passing on leadership skills and promoting positivity	E	Interview
Determine your own work priorities and those of other members of your team and manage conflicting demands appropriately	E	Test, Interview
Have an awareness of wider service demands and issues and recognise pressures that may be being encountered by other teams and sections	E	Interview
Recognise when a procedure or policy is not working as effectively as it could and make suggestions as to how it could be improved	E	Interview
Be enthusiastic about the work of the service and the benefits it provides to its members	E	Interview
Demonstrate good IT and computer skills	E	Application form, Test, Interview
Promote equalities and diversity in the workplace	E	Interview
Be committed to the role and to be flexible, depending on the needs of the service	E	Application form, Interview

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**For Information:**  
**Category**

- E = Essential requirement without which the candidate would be unable to carry out the duties of the post  
D = Desirable features that would normally enable the successful candidate to perform the duties and tasks better and more efficiently than one who did not have those qualifications, training, experience and so on