

JOB DESCRIPTION

Job Title: Pensions Assistant

Directorate & Section/Unit: Finance – Pensions Administration

Reporting to: Senior Pensions Officer

Responsible for: N/A

Salary Grade: Scale 5

DMA Management Level: Frontline

DMA Span of Control (Direct Reports): N/A

Our People Values:

To uphold and act in accordance with Worcestershire County Council's values:

- **Customer Focus** - Ensure delivery of a high-quality service which meets the needs of customers
- **Can Do Culture** - Be proactive to achieve excellence, finding solutions and creative ways of working
- **Freedom within Boundaries** - Make constructive change through cohesive decision making, ensuring services are responsive

Purpose of job:

- Provide a range of pension transactional services, such as calculations needed to undertake the first assessments and recording of information that enable the service to meet its statutory obligations and provide timely and effective services to pensioners, deferred and active members as well as employers and the regulator.
- To undertake calculations of benefits and entitlements.
- To record and process records on the pension system, including preparing correspondence.
- To answer initial queries from members and employers and refer to other team members as appropriate.

Main Activities & Responsibilities:

- To assist with the administration and calculation of all types of benefits and entitlements, including; calculating preserved pension benefits for members ceasing employment; calculating estimates of pension benefits for members and employers and receive and respond to more detailed requests for information; concurrent employment calculations.
- Develop and maintain pension and other financial systems and assist in processing pension data. Including providing information in relation to member records in respect of appeals received under the Internal Dispute Resolution Procedure; preparing correspondence for members, next of kin, solicitors, accountants and Employers; monitoring for returned pension payments, pension payments not received and recovering overpayments; and to trace ex-employees at the release of their pension benefits.
- Undertake ad hoc and service specific projects and tasks including liaising with the DWP and other Local Authorities regarding pension benefits paid to benefit claimants in accordance with national fraud initiative,
- Be first point of contact for colleagues, staff from employers and members to determine how matters can be most effectively progressed from this first contact.
- To request and verify data to enable the calculation of pension estimates.
- Collate and prepare the presentation of performance data relating to service activities.
- Undertake specific, service projects/tasks including liaising with the DWP and other Local Authorities regarding pension benefits paid to benefit claimants in accordance with national fraud initiative,

- Handle a range of administrative work in support for the service including the drafting and preparation of documents, writing minutes, preparing power point presentations, handling enquiries coming into the service, organising meetings and events.

Generic Accountabilities:

- To maintain personal and professional development to meet the changing demands of the job, participate in appropriate training activities and encourage and support staff in their development and training.
- To undertake other such duties, training and/or hours of work as may be reasonably required and which are consistent with the general level of responsibility of this job.
- To undertake health and safety duties commensurate with the job and/or as detailed in the Directorate's Health and Safety Policy.
- The duties described in this job description must be carried out in a manner which promotes equality of opportunity, dignity and due respect for all employees and service users and is consistent with the Council's Equality and Diversity Policy.

Contacts:

In all contacts the post holder will be required to present a good image of the Directorate and the County Council as well as maintaining constructive relationships.

Internal: Elected Members, Directors, Heads of Service, Senior Managers, Management Teams, Managers & Staff across all directorates, Project Staff, Governors, Headteachers, Teachers, Support and other school based staff.

External: District & County Councils, Government Agencies & Departments, Police, Educational Settings, Suppliers, Contractors, Service providers, Statutory and Voluntary Organisations, service users, clients, customers.

Additional Information:

- The Council reserves the right to alter the content of this job description, after consultation to reflect changes to the job or services provided, without altering the general character or level of responsibility.
- Reasonable adjustments will be considered as required by the Equality Act.

Author: Michael Hudson

Date: 26th July 22

Date of grading confirmation: TBC

*** WCC is aiming towards a 5-level management organisational structure with level 5 being the Chief Executive.**