

UNISON Staff Pensions Scheme Manager
Finance Department
Ref: ORD/10

Job Description

Grade: 3
Hours: 35 per week
Location: UNISON Centre, London
Reports to: Director of Finance

Overall Summary

The Staff Pensions Section plays an important role in administering UNISON's medium sized, multi-employer, defined benefits pension scheme. The Staff Pensions Manager will lead a team of 3 staff and the Section reports to the Director of Finance.

Key tasks and responsibilities

- Advising the Director of Finance in their strategic support to the Trustees of the UNISON Staff Pension Scheme.
- Acting as the Scheme Secretary to the Scheme
- Administering all meetings of the Pension Scheme Trustees including Board and sub-committees.
- Preparing agendas and all relevant documentation for meetings and ensure they are well structured, accurate and are available in advance each meeting.
- Supporting the Chair in ensuring that meetings are conducted efficiently and effectively.
- Attending all meetings and ensuring that appropriate advisers and service providers are also in attendance so that each committee receives appropriate advice prior to, and during the meeting, to enable Trustees to question advisors in order to make informed decisions.
- Producing timely and appropriate minutes of meetings and ensuring that any follow up work arising from meetings are actioned.
- Ensuring Trustees have adequate knowledge and understanding of the Scheme and to arrange appropriate Trustee training as required.
- Ensuring the provision of appropriate, reliable, and timely information to the Pension Scheme Trustees to enable them to fulfil their responsibilities. Including, but not exclusively, legal, statutory, investment performance, and financial information.
- Ensuring the maintenance of proper financial records, designing and verifying adequate financial controls and appropriate information databases.
- Ensuring statutory accounts and other statutory information is provided in a prompt and accurate manner. This includes the oversight and management of the Scheme audit.
- Act as principal contact for the Pensions Regulator and other regulatory bodies e.g., Pension's Ombudsman.
- Act as principal contact for the Scheme's Internal Dispute Resolution Procedure.

- Collating asset values monthly ensuring that the weighting to particular mandates remain within agreed bandwidths so that the scheme assets remain invested in accordance with the signed statement of investment principles.
- Reconciling the bank account statement with the cashflow records and to judge whether any disinvestment (or investment) is necessary in order to ensure there are sufficient funds to pay any outgoings (i.e., fees, charges etc.).
- Reviewing, and processing payment of invoices and other expenses of the Scheme.
- Ensuring contributions are received from all participating employers correctly and within the deadlines to remain compliant with the Schedule of Contributions which is externally audited annually.
- Maintaining an authorised signatories list and obtaining appropriate signatories for all BACS and CHAPS payments as required and in line with internal controls.
- Ensuring all Scheme Members (contributing, deferred, pensioners) are provided with information, which is compliant with the relevant disclosure regulations and, where possible, meets 'best practice' criteria.
- Providing a user-friendly information support service to Scheme Members.
- Acting as principal contact with the Scheme Actuaries, Legal Advisors, Investment Advisors, Fund Managers, and Auditors.
- Ensuring that you maintain continuing professional development and are proactive in keeping up to date with current topics within the Pensions Industry.
- Line management of 3 staff to include day to day supervision, work allocation, training needs assessments, and annual appraisals
- Other ad hoc duties pertaining to the Scheme as required.

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Person Specification

UNISON is an equal opportunities employer, committed to providing equal opportunities regardless of race or ethnic origin, gender identity, family situation, sexual orientation, disability, religion, or age. This person specification is designed to help the members of the interviewing panel judge the qualities of interviewees in a systematic and consistent way and in accordance with UNISON equal opportunities policy. It is given to all job applicants for information.

Managerial:

- Experience of managing a small team in all its aspects including training and development
- Confidence and ability to promote strategic development and change at the most senior level.
- Able to anticipate problems, and being self-organised to manage team workloads, perform under pressure and meet critical deadlines.
- Able to work and manage with minimum supervision but also as part of the larger Finance team.

Specialist / Technical Knowledge and expertise:

- Demonstrable practical experience of administering a medium-sized pension scheme.
- Sound up to date technical knowledge of pensions, regulatory developments, and requirements is essential.
- A recognised relevant qualification is desirable.
- Focused on the needs of the various stakeholders and Scheme members.
- Good and practical use of IT, systems tools, and features to extract, analyse, review and/or report on large quantity of data and information.

Interpersonal & Communication:

- Able to win the confidence of Trustees and advisers and build good working relationships.
- Excellent communication skills with the ability to communicate often complex and technical information to variety of stakeholders in simple concise manner