

UNISON Staff Pension Scheme Manager & Scheme Secretary
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 Team plays an important role in administering UNISON's medium sized, multi-employer, defined benefit pension scheme. The Staff Pensions Manager will have the dual responsibilities of managing the in-house administration function with a team of 3 staff and supporting the trustee board to deliver its responsibilities in governing the scheme.

Key tasks and responsibilities

a) Trustee support

- Strategic support to the Trustees of the UNISON Staff Pension Scheme to ensure effective governance arrangements are in place.
- 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.
- Act as the main point of contact with the Scheme's various advisers – ensuring they are providing appropriate advice and support to the trustees in line with their terms of engagement
- Support the trustees to ensure the scheme is compliant with the Pensions Regulator's General Code of Practice and overriding legislation.
- Co-ordinate all relevant record-keeping to ensure the Scheme is operating an Effective System of Governance
- Producing timely and appropriate minutes of meetings and ensuring that any follow up work arising from meetings are actioned.
- Support the Trustees knowledge and understanding by arranging appropriate 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.

b) Pensions Administration functions

Manage the day to day administration of the team, ensuring case work is completed in line with both the Service Level Agreement and overriding statutory provisions

Responsible for all scheme reporting requirements, including SLA reporting and Annual Scheme Return

- Line management of 3 technical staff to include day to day supervision, work allocation, learning and development and performance management
- Ensuring all Scheme Members (contributing, deferred, pensioners) are provided with effective and timely communications in line with the scheme's communication and engagement strategy.
- Providing a user-friendly and responsive service to Scheme Members.
- Ensuring the maintenance of proper financial records, designing and verifying internal controls and appropriate information databases.
- Co-ordinate the preparation of the Annual Report and Accounts, including oversight and management of the Scheme audit.
- Act as principal contact for the Pensions Regulator and other regulatory bodies e.g., Pensions Ombudsman.
- Act as principal contact for the Scheme's Internal Dispute Resolution Procedure.
- Manage the trustee bank account and cashflows, including monitoring of contributions.
- Ensuring that you maintain continuing professional development and are proactive in keeping up to date with current topics within the pensions industry.
- 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 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 defined benefit or similar pension scheme.
- Sound up to date technical knowledge of pensions, regulatory developments, and requirements is essential.
- An understanding of the principles of good governance in relation to a pension scheme.
- Experience of supporting the governing body of a pension scheme and understanding the various stakeholders.
- Focused on providing an excellent customer service to scheme members.
- Good and practical use of IT, systems tools, and features to extract, analyse, review and/or report on a 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.

Initiative & Independence

- Experience of working on own initiative and independently
- Ability to organise, prioritise and schedule work within an agreed set of priorities or work programme managing own work and that of others.
- Ability to lead on a specialist area of work and report to senior managers, scheme trustees and colleagues.
- Ability to analyse and filter information and develop solutions and resolve problems in a clear concise manner.
- Experience of working to deadlines with minimum supervision.

Responsibility for Resources

- High responsibility for financial and information resources
- Maintaining accurate and highly confidential information of scheme members, including both directly employed and branch employed staff, in relation to salaries, personal details and pension benefits and entitlements
- Authorising substantial bulk and individual payments to pensioners and ensuring correct data is produced for purposes of staff payroll and pension payments.

General

- Empathy with the aims and objectives of a modern trade union organisation
- Proven commitment to promoting Equal Opportunities in the workplace.