

## Individual Role – Unique Characteristics



### This document is to be used in conjunction with the Job Family generic role profile

<b>Directorate / School</b>	Resources
<b>Unit / Team</b>	Finance
<b>Job Title</b>	Senior Manager – Pensions & Financial Services (Deputy S151 Cumbria LGPS)
<b>Job Family Role Profile Level</b>	OS7S
<b>Date</b>	Jan 2014
<b>Post Group Number</b> (to be added by Pay and Reward team)	6064

### Purpose

- The purpose of the role is to lead the Pensions & Financial Services teams reporting on the implementation of service objectives and driving performance, reporting directly to the Assistant Director – Finance (Section 151 Officer)
- Manage & coordinate the resources and work of the Pension and Financial Services team ensuring that the discreet areas of responsibility of the role are balanced.

### Key responsibilities

- Ensure that the Cumbria LGPS is impartially, effectively and efficiently operated on behalf of all Scheme members and employers (approx. 60% role). In the capacity as Deputy Section 151 Officer for Cumbria LGPS deputise for the Section 151 Officer as and when required.
- Support and continuously improve all service areas under management, focusing on providing high quality, easily accessible information and advice to customers (both internal and external to the Council).
- To provide a high quality financial service to users within the Council e.g. Members, the Chief Executive and Corporate Directors, and all Service Areas but also to the wider external client base of the Cumbria LGPS, in accordance with the Council's Corporate Strategy, the Cumbria LGPS Aims and Strategies and the Financial Services core aims and objectives.
- Challenge the way in which an organisation thinks, and develop ways of working that have an impact on Finance and more operational elements are key elements to deliver a future, leaner council.
- Support the Assistant Director – Finance in providing the organisation with technical advice on changes to Local Government Pensions and Governance, and the wider public sector, finance and policy changes ensuring the appropriate advice is provided to Members (particularly the Pensions Committee / Investment Sub Group), and the Corporate Management Team

- Lead the designated teams under management, focusing primarily on providing high quality financial services to Members, the Chief Executive and Corporate Directors, and external clients in accordance with the Council's vision and values and the regulatory requirements of the LGPS.
- Set the standard by which accounting records for the Cumbria LGPS will be maintained and ensure that all accounting records are maintained to the highest standard and that financial statements, grant claims, regulatory tax returns etc are compiled accurately and returned by the required deadlines.
- Manage the production and publication of the Accounts and Annual Report and Triennial Valuation Process of the Cumbria LGPS, ensuring that they are completed to a satisfactory standard and published in accordance with statutory guidance and deadlines.
- Liaise with external auditors in the conduct of their audit of areas under management.
- Delivering and support organisational change and transformation, providing clear direction and contributing to the overall management of the service.
- Interpret service demands and pressures ensuring policy developments and service delivery take full account of service needs as well as corporate requirements.
- Ensure service teams under the direct management of this role, engage fully to embed our values and beliefs, encouraging a corporate working culture.
- Provide and quality assure the delivery of the service in accordance with agreed service level standards, focusing on value for money services with customer focus to the service users.
- Ensure effective feedback from customers on service developments and delivery
- Develop partnerships and work collaboratively to deliver value for money and ease of access to services for our customers.
- Contribute to the development and management of processes to monitor, measure, evaluate and continuously improve the Council's policies and services to ensure outcomes meet corporate objectives and key performance indicators whilst remaining responsive to customer feedback and service needs.
- Manage allocated budgets ensuring the Assistant Director is alerted to any likely variances.
- Deputise for the Assistant Director Finance as necessary, representing him/her on internal and external working groups and other bodies as appropriate.
- Promote equal opportunities with our communities and our staff through personal example, open commitment and clear action.
- Undertake such other duties as may be determined from time to time within the general scope and commensurate with the grade of the post.

## **Employee Management Responsibilities**

- Full line management responsibility for sectional managers;

- Second-line management responsibility for employees within dedicated sections

## Resources Responsible for

- Financial – responsible for the financial management for the Cumbria LGPS approx. asset value of £1.8bn, treasury £0.330bn debt; £0.160bn daily investment balances; CCC Payroll – to be determined
- Information – including large volumes of regulatory controlled personal sensitive data (both pensions and payroll).
- Equipment

## Job Working Circumstances

- A. Emotional Demands – Designated officer for ruling on Pensions IDRPs. These cases usually involve dealing with individuals who are under high levels of emotional stress due to ill health; deceased family members; financial hardship.
- B. Physical Demands – normal
  - Limited physical demands, commensurate with those experienced in a normal office environment
- C. Working Conditions – mostly protected indoors. National travel & occasional international travel may be required.

## Person Specification

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	Essential	Desirable
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• Educated to Degree level</li> <li>• An appropriate professional qualification CCAB</li> <li>• Evidence of CPD</li> </ul>	<ul style="list-style-type: none"> <li>• Post graduate Investment Management Qualification.</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>• Substantial knowledge of local authority and wider public sector strategies and initiatives.</li> </ul>	
	<ul style="list-style-type: none"> <li>• Detailed and demonstrable experience of:- <ul style="list-style-type: none"> <li>Pension Fund Management &amp; Accounting</li> <li>Managing investing across a range of different asset classes</li> <li>Risk management</li> <li>People Management</li> </ul> </li> </ul>	
<b>Relevant Experience</b>	<ul style="list-style-type: none"> <li>• Management experience at senior level in a large, complex organisation.</li> <li>• Evidence of developing and delivering a performance culture and organisational change to effect tangible improvement.</li> <li>• Evidence of contributing to and implementing strategy change at a national level.</li> <li>• A successful track record in developing effective working alliance together with a proven ability to network.</li> <li>• Demonstrable experience of managing multi-disciplinary teams and programmes, to effect tangible improvements to service delivery (preferably) in a public sector context.</li> <li>• A successful track record in developing external partnerships, with other organisations and stakeholders, to deliver</li> </ul>	<ul style="list-style-type: none"> <li>• Management experience at senior level in a democratically accountable organisation.</li> </ul>

	<p>required operational outcomes.</p> <ul style="list-style-type: none"> <li>• Evidence of negotiating and managing large value, complex financial contracts.</li> <li>• Developing effective working alliances together with a proven ability to network.</li> <li>• Experience of customer engagement and advocacy in transforming services.</li> <li>• A proven track record in delivering efficiencies and ensuring value for money services.</li> <li>• A proven success in delivering and improving services at the leading edge of our professional function.</li> </ul>	
<b>Skills</b>	<ul style="list-style-type: none"> <li>• Political awareness.</li> <li>• Demonstrable abilities in implementing service led solutions in response to operational and client / service needs.</li> <li>• Ability to lead, motivate, inspire and empower others, by example.</li> <li>• Demonstrable ability as a forward-thinker, able to conceive, develop and implement new initiatives, and manage change.</li> <li>• First-class presentational and communication skills.</li> <li>• Innovation skills.</li> <li>• Ability to work under pressure.</li> <li>• Ability to manage and organise oneself to provide leadership and support.</li> <li>• Excellent interpersonal skills: a strong networker able to communicate, motivate, influence and build relationships with mutual confidence and respect.</li> </ul>	
<b>Other</b>	<ul style="list-style-type: none"> <li>• Ability to travel nationally and locally.</li> <li>• Occasional international travel.</li> </ul>	•