

TERMS OF REFERENCE
PENSIONS PROCESSING EXPERT – SPECIAL EARLY RETIREMENT PROGRAMME
(SERP)

BACKGROUND

The Government drafted Vision 2030 Jamaica, National Development Plan in January, 2009. Its overarching objective is to create the conditions in which Jamaica's productive enterprises are able to generate greater levels of wealth and in which the social and environmental conditions and general well-being of the society are enhanced. Vision 2030 is complemented by A Growth-Inducement Strategy for Jamaica in the Short and Medium Term.

SPECIAL EARLY RETIREMENT PROGRAMME

As part of the process of pension reform, new Pension Legislation is now before Parliament for approval which will inter alia make provisions for pension contributions to be made by all central government employees and will change the basis on which pensions are calculated. To this end, an early retirement project for Central Government Employees within the age range 50 – 59 is being contemplated. This project is owned by the Ministry of Finance and the Public Service and is being supported by the Public Sector Transformation Programme.

The project will have three main components focused on delivering specific and targeted services over a 12-month timeframe.

OBJECTIVE OF ASSIGNMENT

The Pensions Processing Expert is responsible to plan and organize the functions of the Computation activities under the SERP to ensure the efficient and timely processing of retiring benefits to public officers.

SCOPE OF WORK

In order to achieve the stated objectives of the assignment the individual will be required to:

1. **To oversee the effective and efficient processing of pension applications for public officers.**
 - a. Ensures that the documents submitted on behalf of pension applicants are processed promptly.
 - b. Keeps abreast of the various Pension Statues, legislations, regulations, policies and procedures and ensures that the SERP processing team does the same.
 - c. Ensure that team members are provided with the tools necessary for the performance of their duties.
 - d. Works with the Pensions Administration unit of the MOFPS to determine and interpret statues or Legislation applicable to complex cases.
 - e. In collaboration with the Pensions Administration Unit of the MOFPS seeks and obtains legal advice on the interpretation of legislation/ regulation governing pension when necessary.
 - f. Peruses the Pension Particulars and other documents submitted under the SERP.
 - g. Assigns files and ensure that all assignments to Computation officer(s) are completed within the established time frame.
 - h. Liaises with personnel in the Ministries/Departments/Agencies regarding incomplete documentation.
 - i. Examines files to ensure that all relevant documents submitted from Ministries/Departments/Agencies are in order.

- j. Check and ensure that the approvals for advance/alimentary allowances for SERP applicants are obtained
 - k. In collaboration with the Pensions Administration Unit draft/examine and amend complex submissions to the relevant services commission.
 - l. Recommend enhancements to the SERP system for more efficient processing.
2. **To examine and work with the Pensions Administration Unit for the timely signing of awards letters for pension payments by the Accountant General’s Department and other paying agencies.**
- a. Reviews and collaborates with the Pensions Administration Unit for the approval as appropriate allowances for public officers.
 - b. Submit files to the Auditor General and the relevant Services Commission.
 - c. Ensure that correct legislations are applied.
 - d. Ensure that figures used reflect that approved by the Governor General.
 - e. Ensure that the address of the pensioner is correct.
3. **To ensure that adequate information is provided to internal and external clients on pension matters.**
- a. Responds to verbal, telephonic and written queries from Ministries, Departments, Agencies, in respect to the SERP.
 - b. Liaises with Personnel Officers from Ministries/Departments/Agencies to confirm and request information.
 - c. Collate and provide monthly reports.
4. **To lead and manage the section in the achievement of the above strategic objectives.**
- a. Plans, organizes and directs the work of the unit.
 - b. Manages the performance of the unit with particular emphasis on motivating staff, setting performance targets, monitoring performance, and providing feedback to staff.
 - c. Ensures that members of staff in the unit have sufficient and appropriate physical resources to perform their tasks efficiently and effectively
 - d. Maintains effective working relationships with external and internal stakeholders to ensure that the Section provides a consistently high level of service to them.

DELIVERABLES

Key Deliverable	Proposed Timeline	Standard of Delivery
1. Monthly Report	End of month	<p>Nine (9) reports that details:</p> <ul style="list-style-type: none"> ▪ The tasks undertaken for each month and the progress made on activities to-date. ▪ The tasks to be performed for the coming month and the outputs to be achieved. ▪ Issues, challenges and risks affecting objectives and activities. ▪ Proposed mitigation strategies to overcome project risks and concerns. ▪ Recommendations, where applicable, to enhance the Project outcomes. <p>Report must be submitted within the agreed timeframe.</p>

CHARACTERISTICS OF THE CONSULTANCY

- Level of effort: Full time level of effort (FTE) of nine (9) months
- Duration of contract: The Consultancy will begin in November 2017
- Location: Jamaica
- Type of Consultancy: Individual consultant
- Type of contract: Lump-Sum

OFFICE ACCOMMODATION

The work will be carried out in Jamaica and be housed within the MOFPS, Kingston Jamaica offices, as well as administrative support, and any other assistance as may be reasonably required to undertake the duties identified in this TOR.

The Consultant must be able to participate in project activities during business hours, as well as non-business hours on a regular basis as the position demands.

QUALIFICATIONS

- i. First Degree in Public Administration or Management Studies
- ii. Seven (7) years' experience in Pensions Administration.
- iii. Sound knowledge of statues/legislations /regulations/policies and procedures governing pensions.
- iv. Experience in the calculation of retiring benefits for public officers and the preparation of letters of authorization.
- v. Managerial and Customer Service skills.
- vi. Sound knowledge of the Automated Pension Systems (APS) of the GOJ

REPORTING

The Consultant shall report directly to the **SHRMD SERP Coordinator**, and indirectly to the **SERP Project Manager**.