



SOUTH YORKSHIRE  
PENSIONS AUTHORITY

# Human Resources Strategy

2019 - 2022



[www.sypensions.org.uk](http://www.sypensions.org.uk)

Authorised and regulated by the Financial Conduct Authority



# 1. Introduction

SYPA's workforce is central to our success as an organisation. This strategy focuses on how we will:

- Develop,
- Recruit, and
- Retain

a workforce that meets the needs of the organisation as it embarks on the next stage of its development.

To do this we need to pay attention not just on how we attract the best candidates for roles with SYPA from outside, although given the profile of our current workforce this will be important, but also focus on how we can develop the skills of the current workforce. More importantly than any of this, though, we need to focus on the culture of the organisation, how it feels to work here, and the way things are done. These are key factors that will determine whether people want to work for us and whether they want to stay with us and make a career with SYPA.

SYPA is a relatively small organisation, a fact which in itself has many benefits, for example in terms of the ability of management to be visible to staff, however it also has the disadvantages of small scale such as relatively limited resources to actually deliver some of the changes that we need to make. A great positive of the organisation's culture is that this latter point is simply seen as a challenge to be overcome rather than a barrier to achieving our objectives.

## 2. The current reality - Understanding our workforce

To achieve any objective it is necessary to understand the starting point. To facilitate this an analysis of the composition of the current workforce has been undertaken (at 31<sup>st</sup> March 2018). This is summarised in the table below and is available at

<http://meetings.southyorks.gov.uk/documents/s51912/Workforce%20Profile%20Appendix%20A.pdf?zTS=C>

Characteristic	SYPA %	Barnsley %	South Yorkshire %
<b>Gender</b>			
Female	62%	51%	51%
Male	38%	49%	49%
<b>Ethnicity</b>			
Non-white	0%	2%	9%
White	100%	98%	91%
<b>Disability</b>			
Disability	5%	24%	21%
No Disability	95%	76%	79%
<b>Age</b>			
0-19	0.9%	23.5%	24.3%
20-29	13.9%	12.1%	14.4%
30-39	20.4%	11.9%	12.3%
40-49	32.4%	15.6%	14.6%
50-59	26.9%	13.2%	12.1%
60-69	5.6%	11.7%	10.7%
70+	0.0%	11.9%	11.7%

Broadly the current workforce at SYPA is older, whiter and more female than the community which the organisation serves. This is an issue which the Equality and Diversity Scheme highlights as requiring attention and achieving greater diversity in the workforce needs to be an objective of the recruitment element of this strategy.

The level of staff turnover is relatively low at 2.8% for 2017/18. This is both a strength and a weakness, a loyal workforce is a good thing, but a static organisation can become stale and people can become frustrated by lack of opportunity for promotion and development. These are challenges that will need to be addressed in the development and retention element of this strategy.

It is more difficult to understand how well qualified our workforce is both in terms of specific pensions issues and more generally because this data is not held in a structured form. Historically, however, there has been considerable emphasis on internal and external qualification processes in order to support the career grade scheme for Pensions Officers. Far less emphasis has been placed on other groups of staff and little or no emphasis on the development of management skills and competencies (whether through qualifications or other routes). These are issues reflected in feedback in the staff survey and are things which the development and retention aspects of this strategy will need to address.

The HR policy framework has also not received the degree of attention and review that would be expected over recent years, with no systematic updating of policies or review of working practices and this together with the deficits in terms of data related to the workforce will form an area of focus across all aspects of this strategy.

### 3. What we need our workforce to deliver - The future possibility

The Corporate Strategy sets out an ambitious agenda for SYPA over the coming years. This strategy is about providing the organisation with a workforce that can deliver this agenda. Consequently the key characteristics that we are looking for in our workforce are to be:

- Customer Focussed
- Highly skilled and technically knowledgeable
- Adaptable
- Engaged

These qualities have equal weight for staff in all areas of the organisation be that Pension Administration or Investment.

Over the coming years we will need not just to ensure that our current workforce possess these qualities but design recruitment processes to ensure that the staff we have to bring in to replace those who will be lost through retirement have them at the beginning of their career with us.

A well-motivated workforce exhibiting these qualities will ultimately drive change and improvement across the organisation in a self-sustaining way, making SYPA a more sustainable and resilient organisation.

*The overall objective of this strategy is therefore to provide SYPA with a workforce capable of ensuring the delivery of the objectives set out in the corporate strategy.*

Specifically this strategy supports the following corporate strategy objectives, although clearly there is a potential impact on all the objectives:

#### **Customer Focus**

*to design our services around the needs of our customers (whether scheme members or employers).*

#### **Listening to our stakeholders**

*to ensure that stakeholders' views are heard within our decision making processes.*

#### **Valuing and engaging our Employees**

*to ensure that all our employees are able to develop a career with SYPA and are actively engaged in improving our services.*

## 4. Developing the current workforce to meet the needs of the organisation

Our current workforce are a significant asset to the organisation, and it is a fundamental responsibility of management to maintain and enhance the value of that asset. We can do this in a number of ways.

*Supporting ongoing learning and development by:*

- Identifying individual learning and development needs through the annual appraisal process *(by April 2019)*
- Creating structured development programmes for key groups such as pension officers (building on the current career grade scheme) and first line supervisors. *(Arrangements in place by June 2020)*

*Encouraging staff to lead the organisation's improvement agenda by:*

- Embedding the staff suggestion scheme and ensuring that each idea is considered by the relevant senior manager and feedback is provided. *(by June 2019)*
- Creating opportunities for staff to lead the implementation of their own suggestions. *(by June 2019)*
- Recognising staff for the improvements which they have delivered. *(by December 2019)*

*Actively managing the pool of talent within the organisation by:*

- Providing opportunities for internal secondments and "job swaps" in order to broaden experience and prepare individuals for promotion *(from April 2020)*.
- Identifying opportunities for individuals to take on additional responsibilities within their current role in order to broaden experience and add to their skills *(from April 2020)*.
- Providing opportunities for staff to receive mentoring support from senior managers *(from April 2020)*.

*Addressing identified skills deficits by:*

- Providing resources to support the development of first line supervisors and managers across the organisation, including a "line managers essentials" programme for aspiring and current supervisors and team managers *(by December 2019)*.
- Identifying and supporting a "cadre" of UPM "super users" within the various pension administration teams. *(by April 2020)*

### Measuring success

The success of these steps will be measured through the overall level of morale and motivation within the organisation which will be assessed through the results of the staff survey, together with information on absence rates, staff turnover, grievance and complaint data and information from exit interviews.

## 5. Recruiting a workforce for the future

The structural imbalances within our current workforce mean that we will need, over the coming years, to devote time and effort to bringing the right people into the organisation to replace those who will be retiring. The costs of getting this wrong in terms of repeated recruitment exercises can be substantial and we can enhance our chances of success by:

*Widening our recruitment net and turning more interest into applications by:*

- Identifying and utilising different methods of advertising, such as social media, so as to reach a wider audience, including groups underrepresented in the current workforce (*by April 2019*).
- Improving our recruitment material so that applicants have a greater understanding of the organisation they are applying to join (*December 2019*).
- Reviewing the recruitment process to ensure that it provides as smooth and as short a “journey” as possible for the applicant (*By April 2020*).

*Planting the seeds to grow the workforce of the future by:*

- Offering work experience placements for BTEC (and in future T Level) students (*From September 2019*).
- Providing an apprenticeship route within pension administration (*formalised by December 2020*).

*Making sure that where we need to recruit at a senior or managerial level we get the right people by:*

- Focussing not just on candidate’s technical abilities but on their managerial skills and ensuring that these fit with SYPA’s approach, through the use of values based recruitment (*by December 2019*).
- Developing a specification for the “SYPA Manager” skill set which reflects the organisation’s values and culture (*by December 2019*).

### **Measuring success**

We will know if these actions have made the desired impact if we see an increase in the diversity of the workforce, and an improvement in the assessment of the quality of management within the staff survey.

## 6. Retaining a high quality workforce

While the composition of our current workforce means that some level of recruitment activity is inevitable over the coming years we do want to retain staff and let people build a career with SYPA. There is a delicate balance here as we need to maintain sufficient staff turnover to avoid the organisation becoming stale and the level of turnover becoming destabilising. We can ensure that we retain a high quality workforce by:

*Adopting modern HR policies and practices which strike a balance between flexibility for the employee and the business needs of the organisation, through:*

- Reviewing all HR policies in the light of current legislation best practice, and the local labour market (*review completed by December 2020*).

*Ensuring that our staff are healthy and safe in the workplace by:*

- Formalising the arrangements for managing workplace health and safety and reviewing and refreshing the Health and Safety policy (*by December 2019*).
- Adopting a wider definition of health and safety which includes workplace well-being and supporting projects to support this (*ongoing from January 2019*).

*Maintaining a fair pay and reward structure by:*

- Ensuring the transparent evaluation of all new or revised job roles (including senior managers) resulting from the process of change within the organisation (*ongoing*).
- Reviewing the pay spine in the light of the requirement to accommodate the latest national pay award and changes to the pay structure (*April 2019*).
- Reviewing the wider benefit package available to staff (*April 2020*).

*Engaging and communicating with staff openly to allow them to influence the future direction of the organisation by:*

- Providing an opportunity for all staff to hear from the Fund Director at least once a year about the overall performance and direction of the organisation, and ask questions and express views (*September each year*).
- Maintaining and enhancing the recently developed communication methods including “stand up’s”, Director’s updates, team meetings and 1:1’s and ensuring that these are applied consistently across the organisation (*ongoing*).
- Re-establishing the appraisal process on a consistent basis across the organisation.
- Maintaining a regular dialogue with the trade unions, and ensuring all staff are aware of the issues discussed (*from April 2019*).
- Undertaking a staff survey bi-annually and ensuring that the results are acted upon (*next survey due June 2020*).

### Measuring success

We will know if these measures have been successful if we maintain a relatively low level of staff turnover and if the measures of staff satisfaction and engagement derived from the staff survey reflect positive progress. We would also expect to measure the degree of compliance with corporate policies such as conducting appraisals, 1:1’s and team meeting.

## 7. Resourcing the strategy

The resources available to deliver this strategy are as follows:

	<b>2019/20</b> <b>£</b>	<b>2020/21</b> <b>£</b>	<b>2021/22</b> <b>£</b>
Strategic HR SLA with Barnsley MBC	40,000	40,800	41,600
HR Officer (0.8 FTE)	24,200	24,700	25,200
Training Budget	46,300	46,300	46,300
Occupational Health Budget	2,300	2,300	2,300
<b>Total</b>	<b>112,800</b>	<b>114,100</b>	<b>115,400</b>

There are a number of areas where additional investment may well be needed over the coming years in order to deliver the wider objectives of this strategy, in particular the need to be able to generate and report management information which will necessitate investment in information systems over the period. This form of investment will be considered through a business case process when required.