



## Public Service Pensions Board

**Job Title:** Director, Plan Member Services  
**Functional Group:** Pension Administration, Management and Member Services  
**Reports to:** Chief Pension Officer (CPO)  
**Date of Current Version:** 07 November 2025

### JOB SUMMARY

The Director, Plan Member Services, is responsible for Pension Administration and oversight of the Member Services Department. They will be responsible for a broad portfolio of customer-facing services, driving Member Services and customer engagement effectiveness and operational efficiency in support of service delivery and innovation. The incumbent is responsible for all pension administration matters and reports directly to the CPO. In addition, the incumbent works closely with the Director, Pension Management, to improve internal efficiency through technology and automation while ensuring that the function is managed in compliance with the applicable legislation and regulations governing the PSPB. The Director, Plan Member Services supervises, guides, and mentors team members and deputizes and acts for the CPO as needed.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

#### Financial and Operational

- Responsible for the accurate and timely delivery of all pension related services for active, deferred and retired members of the pension plans.
- Participates in the annual business development plan and provides support to the CPO for the budgeting process.
- Responsible for carrying out ongoing refinements to the operations of the Plan to deliver efficiencies, enhancements, and recommendations for resource requirements to the CPO.
- Develops, revises, and implements new or enhanced services in line with the strategic objectives to optimize functionality and improve productivity.
- Responsible for all incoming contributions, and member and employer data remitted to the PSPB on all pension-related matters.
- Oversees the maintenance and accuracy of the following delivered in accordance with service standards:
  - i. member pension records;
  - ii. workflow management systems;
  - iii. member and employer self-service applications (portals);
  - iv. pension calculation tools and procedures; and
  - v. pension calculation internal standards and controls.

#### Quality Control and Regulatory Compliance

- Leads regular reconciliations to ensure accuracy of benefit payments and pension records.
- Ensures the quality and accuracy of information provided by team members regarding terminations, pension estimates, deaths, powers of attorney, new retirements, etc.
- Works with members of the Plan Member Services team to develop individual skills and improve ongoing case management from front line staff.

- Acts as the Plan's Privacy Officer by supervising compliance with the Authority's Statement of Privacy Principles and applicable legislation.
- Reviews Plan Text and Authority's policies relating to Plan administration and recommends updates as required.
- Ensures the Plan is operated in compliance with the Plan Documentation and policies and applicable pension legislation.
- Files Annual Information Returns and Plan Amendments Impact Assessments with OAG.

#### Stakeholder Relations and Communication

- Manages relationships with external pension administration service provider(s).
- Supervises the preparation of members' communications, including forms, statements and website information and conducts or arranges orientation for new members.
- Prepares monthly, quarterly, and/or annual reports for the Senior Management Team, Core Senior-Executive Committee, participating employers, and plan member groups etc. about plan administration activity and issues, and gives presentations as needed.

#### Talent Management

- Manages a client-facing team and guides and develops team members on complex work, managing work schedules, delegating tasks, coordinating team meetings, absence management, performance management including completing reviews and evaluations, creating annual training plans and providing regular timely feedback.
- Provides clear, visible, authentic, and inclusive leadership to create and foster a supportive and ethical working environment which promotes collaboration and knowledge sharing, accountability, innovation, creativity, and learning and development to inspire and motivate team members.
- Coaches, mentors, advises, trains, and reviews work completed by team members to develop junior employees.
- Holds team members accountable for results, efficiency, and completing work within deadlines as well as compliance with service standards for member transactions or Key Performance Indicators (KPIs).
- Acts as a technical resource for team members and colleagues across the PSPB.

#### Other Responsibilities

- Attends regularly scheduled meetings with the executive management team and provides reports to update on pension operations, key case escalations, statistical outputs and other critical management needs.
- Liaises with regulatory bodies, other pension plan sponsors and administrators, lawyers, consultants, actuaries, auditors, and other relevant parties, as appropriate.
- Keeps abreast of pension administration best practices, technology, industry trends and developments, and relevant changes to the legislative and financial regulatory environment.
- Must be familiar with and conduct activities in accordance with PSPB's policies and procedures, standard operating procedures, the PSPB Risk Register as well as relevant laws, acts and government regulations, such as the Public Service Pensions Act and Regulations, Personnel Regulations, Police Act, Parliamentary Pensions Act, Judges Emoluments and Allowances Order, National Pensions Act, Cayman Islands Labour Act, Public Authorities Act, Data Protection Act, Cayman Islands Immigration Act, Standards in Public Life Act, Freedom of Information Act, and communicates any changes to the CEO, CPO and the entire Pension Plan Office staff as needed.
- Provides any necessary information to the external auditors as per the annual audit cycle.
- Supports and executes projects and change implementations and contributes and supports the management of the larger PSPB team.

#### **QUALIFICATIONS AND EXPERIENCE**

- Bachelor's degree in Business Administration, Mathematics, Statistics, Actuarial Science, Economics, Accounting, Finance or related field; a Master's degree in one of these fields is preferable.
- Minimum of ten (10) years of relevant industry or government experience including in-depth pension related expertise. Experience in the public sector or pensions industry is an asset.

- Minimum of five (5) years of managerial, supervisory, and/or demonstrated leadership experience.
- Internationally recognized pension or actuarial accreditation, e.g., Pensions Management Institute, Certified Employee Benefits Specialist, Associate or Fellow of the Institute and Faculty of Actuaries, Society of Actuaries or Canadian Institute of Actuaries, or related designation or certification is an asset.

### **KNOWLEDGE, SKILLS, AND ABILITIES**

- Strategic and holistic thinking with the ability to develop and present data driven recommendations, conceptualize new approaches and solutions, and promote a culture of innovation and continuous improvement across the functional group.
- Knowledge of the local government operations, management of public service pension, with expertise in industry specific concepts.
- Commercial awareness of current economic and market trends including regional and international issues with an awareness of the effects of external conditions on the fiscal performance of the PSPB.
- Results driven mindset with advanced analytical capability, critical thinking, conceptual skills, problem solving, decisiveness, and independent judgement with the ability to perform work with decision making autonomy and review, analyse, and resolve most complex technical issues with accuracy and attention to detail.
- Excellent written and verbal communication skills including both technical and business writing, report preparation, documentation, presentation, and facilitation skills.
- Proven understanding of risk management issues with the ability to identify relevant issues and address them.
- Proven success in interacting with employees and stakeholders of various levels, including management and senior executives to build strong relationships, consult, build consensus, negotiate, motivate, and influence change.
- Strong project planning, organizational, time management, and delegation skills with the ability to work on own initiative, efficiently manage multiple competing priorities and pressing deadlines concurrently and display resilience when dealing with ambiguity.
- Strong interpersonal skills including active and empathetic listening.
- High level of maturity, professionalism, honesty and integrity, tact and diplomacy, commitment, initiative, consistency, dependability, fairness, and confidentiality.
- Strong leadership skills and ability to create a learning environment for team members, fostering a shared vision and sense of purpose.
- Culturally sensitive with the ability to lead a multi-cultural and diverse team-oriented and collaborative workforce both effectively and diplomatically aligned with inclusive working practices.
- Agile, adaptable, and proactive approach with the ability to deliver transformative change and thrive in an environment of constantly changing conditions.
- Technically savvy and proficient in common office software such as MS Office suite (Word, Excel, PowerPoint, and Outlook), and comfortable learning new technology tools i.e., pension management tools.
- Previous experience of using pension administration systems in some manner, either for processing, oversight, or management.
- Strong drive, enthusiasm, and an outstanding work ethic.
- Strong understanding of client/member needs, and reactively and proactively address their requirements in a timely and clearly communicated manner.
- Ability to focus on the impact on others when considering alternative approaches.
- Ability to interpret and transfer complex information to others using 'non-technical' language where necessary to ensure effective communication with internal and external stakeholders that can have differing levels of understanding and experience.

### **SUPERVISORY RESPONSIBILITIES**

- Direct supervisory and decision-making responsibility includes allocating and delegating work, prioritizing, scheduling, and providing recommendations regarding the need to hire, transfer, suspend, layoff, recall, promote, discharge, reward, or discipline subordinate employees.

- Ensures that team members are delegated the appropriate and relevant levels of accountability and authority, assigns, reviews, and evaluates team members performance.
- The incumbent is directly responsible for the supervision of two (2) Senior Member Services Officers – Member Services.
- The incumbent is one (1) of two (2) Directors who deputize and act for the CPO.
- Provides on-the-job training, mentoring, effective performance feedback, and identifies training and development needs as applicable.

#### **WORKING CONDITIONS**

- The incumbent will be expected to perform the essential functions and duties of the job under normal working conditions and standard business working hours.
- Flexibility to work overtime beyond the normal work hours such as on evenings and/or weekends as necessary to complete required duties and functions and meet deadlines.
- The incumbent must be able to carry out and complete their work with frequent and varied interruptions such as meetings, calls, employees asking for assistance, etc.
- Must have the ability to sit or stand while working for extended periods of time.
- Attend in person and virtual meetings with clients and stakeholders.
- Travel to Cayman Brac and other regional or international business travel as necessary.