

## Managerial Role Description of Responsibility

<b>Role:</b>	<b>Human Resources Manager</b>
Pareto Department	Operations
Departments/Functions Managerial Role Responsible for:	Human Resources
Reports into Senior Manager/Director:	Nicky Aspray
SM/Director Responsibility	Operations Director Human Resources Director
Role Description Version Effective Date:	External JDHR001- February 2024

## Role Overview

To oversee all HR areas within the Company on behalf of the Operations Director,

To act as chief HR liaison between all Pareto teams, working collaboratively to improve HR awareness and minimises business risk in policies, processes and procedures.

## Overall Responsibility – Human Resources (HR) Manager

<b>People Management</b>
<p>This involves:</p> <ul style="list-style-type: none"> <li>⇒ Encourage a happy and relaxed working environment.</li> <li>⇒ Work with all departments, to ensure company values are intrinsic to working practices.</li> <li>⇒ Foster an inclusive working environment and model the values of the company.</li> <li>⇒ Support in building a diverse and inclusive workforce.</li> <li>⇒ Develop and nurture employee wellbeing strategies.</li> <li>⇒ Proactively look to improve any areas identified as a result of staff engagement feedback.</li> <li>⇒ Provide generalist HR support across all areas of the company.</li> <li>⇒ Provide advice, guidance, and best practice on employment issues to employees including Company policies and procedures, terms and conditions.</li> <li>⇒ Ensure effective working relationships with senior stakeholders.</li> <li>⇒ Facilitate and aid effective communications between managers and staff.</li> <li>⇒ Assist Operations Director with HR Communications</li> <li>⇒ HR inbox management and maintenance.</li> <li>⇒ Maintenance of HiBob System (internal HR platform).</li> </ul> <p>This involves:</p> <ul style="list-style-type: none"> <li>⇒ Managing the employee lifecycle:</li> </ul> <p><u>Staffing and Recruiting</u></p> <ul style="list-style-type: none"> <li>⇒ Recruit new employees into the departments where required.</li> <li>⇒ Engage and liaise with recruitment companies and representatives.</li> <li>⇒ Establish screening and interview process.</li> <li>⇒ Guide and inform hiring managers on candidate selection and the interview process.</li> <li>⇒ Participate in recruitment and selection interviews as and when required.</li> <li>⇒ Develop the 'employer brand' to support in becoming an Employer of Choice</li> <li>⇒ Update job descriptions for all roles.</li> <li>⇒ Create and issue offer letters and contracts of employment and oversee onboarding process for new employees.</li> </ul>

## People Management (Cont'd)

- ⇒ Ensure regulatory requirements, compliance or references are undertaken as part of the onboarding process for new employees.
- ⇒ Oversee induction process following best practice ensuring effective induction of new starters.

### Ongoing monitoring, review and assessments of the Employees

- ⇒ Probationary review monitoring for all new employees
- ⇒ Time & attendance monitoring
- ⇒ Monitor study leave throughout the company in accordance with the study policy.
- ⇒ Work with line managers to assess training needs and develop and apply efficient training programs where necessary.
- ⇒ Provide guidance and support for all performance management and develop effective performance systems and tools.
- ⇒ Oversee any Performance Improvement Plans.
- ⇒ Annual Appraisal monitoring
- ⇒ Processing Payroll in conjunction with Accounts team.
- ⇒ Introduce and manage career development across the company.
- ⇒ Conduct grievance and disciplinary hearings where required.

### Employee Benefits

- ⇒ Manage the enrolment of staff into employee benefit schemes and ensure these are kept up to date, joiners, length of service enhancements and leavers.
- ⇒ Ensure Employee Benefits package is suitable and up to date.
- ⇒ PMI Scheme administration
- ⇒ Employee Recognition and Perk platforms alongside C&V committee.

### Exit Process

- ⇒ Lead on exit interviews and conduct turnover analysis, making actionable recommendations based on insights.
- ⇒ Process reference requests in a timely manner.
- ⇒ Maintain retention stats to report to Board.

## Team Management

This involves:

- ⇒ Direct responsibility for the HR Team (subject to growth).
- ⇒ Monitor the ongoing productivity and work quality of the HR Team.
- ⇒ Manage and supervise a small team of support colleagues, overseeing their personal development, appraisals and workloads.
- ⇒ Motivate individual teams to take pride and responsibility in their day-to-day duties, encourage them to go the extra mile, and look for ways to improve the HR service to our colleagues.
- ⇒ Conduct Regular Team Meetings.
- ⇒ Working alongside the Administration Manager and Technical Services Manager, you will represent the management team for the Operations Department.
- ⇒ Collectively with the Administration Manager and Technical Services Manager, you will hold monthly Operational Team Meetings.
- ⇒ In the absence of the Senior Manager/Director, you will together with Administration Manager and Technical Services Manager oversee the running of the Operations Team.

### Training and Development – Line Managers

- ⇒ Train, support and develop each Line Manager with basic HR knowledge and ability to carry out basic HR requirements.
- ⇒ Conduct internal training for Line Managers around HR policies, procedures, existing and new improvements to the employee lifecycle.

<ul style="list-style-type: none"> <li>⇒ Work in conjunction with the Training and Development Manager on assessing the training needs of our employees.</li> <li>⇒ Look for external training where required.</li> <li>⇒ Provide advice, guidance, and best practice on employment issues to Line Managers including Company policies and procedures, terms and conditions and case management.</li> </ul>
<b>Change Management (Strategy)</b>
<p>This involves:</p> <p>In conjunction and collaboration with other Managers, Senior Managers/Directors and MD:-</p> <ul style="list-style-type: none"> <li>⇒ Provide HR support on operational and strategic projects across the company.</li> <li>⇒ Work with the Board to help deliver the company's strategic plans.</li> <li>⇒ Provide KPI statistic to the Board on a regular basis, which may highlight the need for review or improvements.</li> <li>⇒ Assess risk and identify gaps in employee relations processes.</li> <li>⇒ Conduct Employee Engagement Surveys, collating feedback to identify areas where improvement required.</li> <li>⇒ Assist Operations Director with any HR Project work, participate pro-actively, positively, and constructively in ad-hoc projects, such as but not limited to SMART appraisal system, HR Systems, Staff Handbook, HR Policies and Staff surveys.</li> <li>⇒ Actively seek to put the company forward for relevant employer recognition awards, based on employee culture and feedback, such as but not limited to Top 100 Companies, Best IFA, in conjunction with C&amp;V, Marketing team.</li> <li>⇒ Maintain the Pareto Staff Handbook and ensure always up to date.</li> <li>⇒ Review all procedures and processes for HR around the employee lifecycle at Pareto.</li> <li>⇒ Look to enhance the internal procedures and processes for HR, to improve efficiencies and quality output.</li> <li>⇒ Enhance the use of our internal HR platform and make it a fundamental element to the department.</li> <li>⇒ Engage the Pareto team with looking for innovations and ideas for improvements.</li> <li>⇒ Make recommendations for review on employee initiatives.</li> <li>⇒ Look for ways to improve working practices at the Company.</li> </ul>
<b>HR Law &amp; Regulations</b>
<p>This role involves:</p> <ul style="list-style-type: none"> <li>⇒ Ensure all HR policies / procedures are up to date and compliant with legislation and best practice.</li> <li>⇒ Conduct thorough due diligence for new employees to protect the company.</li> <li>⇒ Lead on disciplinary, grievance and performance meetings ensuring conducted in a fair and transparent manner.</li> <li>⇒ Act as point of contact for HR queries from line management and staff providing advice and guidance on employment matters considering employment law, best practice and terms and conditions of employment.</li> </ul>
<b>Committee/Executive Groups</b>
<p>This role involves being a member of the:</p> <p><b>PMG (Pareto Management Group)</b>  Representative of the PMG (Pareto Management Group), where operational improvements are discussed and approved, such as but not limited to, benefits, systems, process and procedure improvements.</p> <ul style="list-style-type: none"> <li>⇒ Ensure all reports are submitted in a timely manner.</li> <li>⇒ Seek approval where necessary from the Board.</li> </ul>

Reporting to the Operations Director
<p>Regular attendance to Operations Manager Group meeting to discuss Operations Team, working environment, projects, department improvements – forward thinking strategy.</p> <ul style="list-style-type: none"> <li>⇒ Oversee the KPI/MI information that is provided for HR, to the Board KPI Dashboard on behalf of the Operations Director.</li> <li>⇒ Regular 1to1 meetings with Operations Director.</li> </ul>
General Housekeeping
<ul style="list-style-type: none"> <li>⇒ Adhere to Clear Working Desk Policy, responsibility both as an individual and for your respective teams.</li> <li>⇒ Adhere to Company H&amp;S policy.</li> <li>⇒ Adhere to Company Procedure and Policies at all times.</li> <li>⇒ Represent the company in a professional manner at all time.</li> <li>⇒ Any other duties as and when required by the Company.</li> </ul>

## About the Company/Reward Package

Pareto
<ul style="list-style-type: none"> <li>⇒ Pareto Financial Planning Limited was founded in 2008 and are an award-winning firm of independent financial advisers (IFAS), with an established reputation for dealing in all areas of financial planning.</li> <li>⇒ Top 100 IFA Firms to Work for Accolade</li> <li>⇒ Winner of The Talk of Manchester Business Awards – Best IFA</li> <li>⇒ We value our people; now employing a team of 68. This has led to new clients and total funds under influence being more than £1 billion.</li> <li>⇒ Training Academy ethos for those that want to develop their career. Company provides an excellent In-House training program for you to progress your career including a generous study scheme and Personal Development Plan.</li> <li>⇒ Great atmosphere, team spirit and thoroughly enjoyable working environment.</li> <li>⇒ Organised social events calendar for all who want to participate.</li> <li>⇒ Good work/life balance structure in place.</li> <li>⇒ Dedicated to various charities throughout North West.</li> </ul>
Reward Package
<ul style="list-style-type: none"> <li>⇒ Competitive Salary</li> <li>⇒ 35 hours per week</li> <li>⇒ Hybrid Working (3 days Office 2 days at Home- full time employee)</li> <li>⇒ 27 days holiday plus Bank Holidays.</li> <li>⇒ 1 x holiday- Birthday holiday</li> <li>⇒ Loyalty holidays with continued service.</li> <li>⇒ Christmas Closure (need to retain 3 days from allowance)</li> <li>⇒ Profit Sharing Scheme</li> <li>⇒ Perks Benefit Scheme</li> <li>⇒ Pension (auto-enrolment, then increasing dependent on length of service.</li> <li>⇒ Private Medical Insurance (after 12 months)</li> <li>⇒ Life Assurance</li> <li>⇒ Long Term Service Awards</li> <li>⇒ Fully funded company social events – summer and winter</li> <li>⇒ Generous Study/Training Program</li> <li>⇒ Annual Appraisal System, Regular 1:1 Meetings.</li> </ul>