

Role Profile

Part A - Grade & Structure Information

Job Family Code	8BF	Role Title	Investment & Governance Officer
Grade	PS8	Reports to (role title)	Senior Manager - Investment & Stewardship
		Directorate/School	Resources
JE Band	269-313	Service/Department	Surrey Pension Team
		Date Role Profile was created	Apr-25

Part B - Job Family Description

The below profile describes the general nature of work performed at this level as set out in the job family. It is not intended to be a detailed list of all duties and responsibilities which may be required. The role will be further defined by annual objectives, which will be developed with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

Role Purpose including key outputs	This role will make an important contribution to the success of the Surrey Pension team. Operating with line manager oversight and a degree of professional independence and autonomy the role will predominantly undertake operational work with some project-related work (the mix will vary according to the nature of the work) in line with Surrey Pension Teams strategic objectives. This role is to support the whole Investment and Governance Team, with time allocated between investment duties and governance duties depending on requirements and the cycle of workload throughout the year. The role will help enable the team to meet its business plan and strategic objectives. There will be close contact with other service areas of the Fund to actively seek service improvements in line with strategic objectives to improve operational efficiency and improve customer experience. The role will provide a proactive and professional approach, continuously seeking to improve performance by strengthening skills and competence and fostering a strong culture of standards and accountability enabling the Surrey Pension Team to responsibly deliver a first-class customer experience.
Work Context	The Surrey Pension Fund is part of the national Local Government Pension Scheme (LGPS). Surrey County Council is the administering authority and is structured to provide investment, funding and governance functions in respect of management of the fund, as well as the day to day administration; processing all tasks through the pension lifecycle from new joiners through to retirement and dependents' benefits. It also promotes and maintains a culture of collaborative and consultative working between customers and stakeholders to optimise financial opportunities and long term viability of the fund. The fund which has a value of over £6billion, has more than 130,000 members and c.500 participating employers including councils, universities, colleges, academies and private companies providing public services.
Line management responsibility if applicable	N/A
Budget responsibility if applicable	N/A

Representative Accountabilities Typical accountabilities in roles at this level in this job family	Analysis, Reporting & Documentation • Prepare and analyse management information, including financial reports / project plans, recommending actions as appropriate. • Maintain, develop and review business support systems, processes and procedures to secure a quality, cost effective service and continuous improvement. Service Delivery • Deliver a range of specialist services advising and assisting customers in area of expertise, to maximise service quality, efficiency and continuity. • Maintains knowledge of the organisation's current systems, policies and procedures. • Resolve issues/queries independently, recommend alternative solutions if unable to assist, and ensure efficient, day-to-day customer service is delivered. Planning & Organising • Monitor service objectives and standards within own area of work to ensure effective service delivery. • Plan and prioritise own work activities for the months ahead, to ensure operational efficiency. Respond effectively to changing demands, adjusting priorities as needed. Finance/Resource Management • Assist budget/resource management in accordance with the organisation's policies and procedures. • Maintains, develops and reviews financial support systems, processes and procedures. Work with others • Liaise, communicate and build relationships with other internal departments, customers, partner organisations, agencies and/or contractors to support and represent the team/service. • Undertake and coordinate projects and reviews in a defined area of activity to support and enhance service delivery. People Management Either: • Manage staff, allocating and prioritising their work and manage performance to secure efficient service delivery. • Oversee the work of others as the most experienced team member. And/Or: • Operate as an individual maintaining and improving operational efficiency and quality of service of own area. • May be recognised as the main point of contact for a particular specialised process, system or procedure or for a senior member of staff. Duties for all Values: To uphold the values and behaviours of the organisation. Equality & Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity. Health, Safety & Welfare: To work alongside colleagues in the maintenance of a safe working environment reporting incidents, accidents, repairs and maintenance promptly and taking appropriate action as required. Adherence to safe working under the health and safety policy is required. To have regard to and comply with safeguarding policy and procedure as appropriate.
Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics	• Educated to 'A' level standard, or able to evidence ability at an equivalent level. • Professional business qualification to NVQ Level 4, or able to evidence knowledge and understanding of appropriate business disciplines; willingness to study for a relevant professional qualification if appropriate. • For some roles a relevant degree may be required. • Excellent IT skills. • Excellent written and oral communication skills with the ability to build sound relationships with customers, adapting styles to different situations. • High level administrative/organisational and analytical skills. • Ability to manage a range of projects through to completion. • Effective interpersonal, influencing and negotiation skills. • Practical experience and understanding of business supporting service teams and/or providing support to the public (where appropriate). • Experience of leading a team (where appropriate).
Details of the specific qualifications and/or experience if required for the role in line with the above description	• Builds trust, enabling a balance of working in partnership and offering constructive challenge. • Communicates skills to relay financial/pension insights effectively with a non-finance/pension audience • Embraces change through adaptability and a positive approach. • Regularly seeks and offers feedback • Ability to work to set deadlines • Keen interest in investment and governance and appetite to learn more • Ability to perform tasks within a financial/pensions committee management cycle • Ability to analyse and interpret complex financial/pensions information • Comfortable in using financial/pensions data – manipulation, reconciliation, attention to detail • Good command of language for proofreading and report writing • Knowledge of and proficiency in use of IT, Excel, Word, PowerPoint • Key strengths of accuracy, inquisitiveness, tenacity, problem solving, time management

Role Summary	Roles at this level may manage a straightforward operational activity or small team, provide specialist support services or they may be in the second year of a professional career development role. They have in-depth knowledge of methods, systems and procedures and possess practical understanding in one or more disciplines, for example finance, HR, communications, facilities, procurement. They are often process 'experts' seeking to deliver maximum efficiency within a defined process. A thorough knowledge of their own area or discipline is required although overall supervision from a more experienced professional is in place. They work collaboratively with customers, staff, partner organisations, agencies and/or contractors and play a major role in maintaining quality standards and/or engaging in project management.
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