

Role Profile

Part A - Grade & Structure Information

Job Family Code	6BF	Role Title	Associate
Grade	PS6	Reports to (role title)	Customer Relationship Team Manager
		Directorate/School	Resources
JE Band	192-227	Service/Department	Surrey Pension Team
		Date Role Profile was created	Feb-23

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	<p>This role will contribute to the success of the Surrey Pension team. Operating with a limited degree of professional independence and autonomy the role will predominantly undertake operational work with specific responsibility for being the primary point of contact for customers and stakeholders and supporting the Customer Relationship Team Manager. This includes:</p> <ol style="list-style-type: none"> 1. Providing a high level of customer service at all times 2. Responding to high volumes of enquiries within the specified KPIs/SLAs 3. Providing accurate information obtained from specialist IT systems or by referring defined complex enquiries to transactional or specialist second line support 4. Maintaining information systems to ensure consistency and integrity of data 5. Contributing to and recommending changes and improvements to develop the level of service provided by the team <p>The role will adopt the Surrey Pension Team culture of strong standards and accountability in order to responsibly deliver a first-class customer experience.</p>
Work Context	<p>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.</p> <p>The fund has over 300 participating employers including the county council, district and borough councils, universities, colleges, academies and private companies providing public services.</p>
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	<p>Analysis, Reporting & Documentation</p> <ul style="list-style-type: none"> Provide and manipulate data for statistical purposes and run and present standard reports. Prepare and despatch a range of correspondence/documents to facilitate efficient response to enquiries and timely conclusion of any process connected with the defined area of activity. <p>Service Delivery</p> <ul style="list-style-type: none"> Deliver a range of administrative and/or customer/consultancy services in support of existing systems or processes to agreed standards, to maximise service quality and continuity. Receive and respond to everyday enquiries from colleagues and customers to provide a timely, courteous and effective service. <p>Planning & Organising</p> <ul style="list-style-type: none"> Support a group of senior staff/service team, ensuring confidentiality, and assisting in the effective organisation of internal/external meetings and activities to support a high standard of office organisation. Plan and prioritise own week-to-week work activities, to ensure operational efficiency. Refer to more senior colleagues for prioritisation of non-standard work. <p>Finance/Resource Management</p> <ul style="list-style-type: none"> Follow established ordering procedures to ensure adequate resources are available. <p>Work with others</p> <ul style="list-style-type: none"> Maintain a network of contacts, knowing who to liaise with on key issues to report on and resolve issues. Communicate and liaise with service users and/or external contacts, usually through established routine connections as own section of work requires. <p>People Management</p> <ul style="list-style-type: none"> Guide junior staff in duties to facilitate their development and ensure routines observed. <p>Duties for all</p> <p>Values: To uphold the values and behaviours of the organisation.</p> <p>Equality & Diversity: To work inclusively, with a diverse range of stakeholders and promote equality of opportunity.</p> <p>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.</p> <p>To have regard to and comply with safeguarding policy and procedure as appropriate.</p>
Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics	<ul style="list-style-type: none"> Minimum 5 GCSEs at Grade C or above, or equivalent, or able to evidence ability at an equivalent level. Relevant HR, management, communication, business administration or financial qualification to NVQ Level 2/3, or able to evidence knowledge/understanding of relevant discipline. Familiar with one or more of the specific processes used in the relevant discipline. Ability to apply relevant health and safety, equality and diversity, and other County/Service policies and procedures. Competent in a range of IT tools. Ability to work with others to achieve objectives and improve customer service. Good written and oral communication skills with the ability to build sound relationships with customers. Good administrative /organisational and analytical skills. Ability to prioritise and plan own workload in the context of conflicting priorities and work on own initiative. A methodical approach to information gathering, recording and reporting. Previous relevant work experience. Experience of maintaining business processes and systems. Ability to guide and support less experienced or more junior colleagues (for some roles).
Details of the specific qualifications and/or experience if required for the role in line with the above description	<ul style="list-style-type: none"> Proficiency in use of financial/pensions data – manipulation, reconciliation, attention to detail Knowledge of and proficiency in use of IT within a finance/pensions environment
Role Summary	<p>Roles at this level provide a business support service as part of a specific service or service team. They will carry out a range of administrative tasks using knowledge of general office routines and procedures, together with a broad understanding of the department and how the tasks directly support the service or service team. The work is within established processes and procedures and while it may not be subject to direct supervision, guidance is readily available. They will be expected to organise their own workload and set their own priorities within short, e.g. day-to-day or week-to-week timescales, usually reacting to clear deadlines or processes. They support more senior staff by executing the detailed processes in specific aspects of business, financial, communication, facilities and/or HR administration and will be fully versed in all the procedures of their specialism. They may be involved in guiding the work of more junior staff. For some roles, customer service may be the predominant feature, e.g. dealing with a variety of clients in relation to a department's activities. Others may support a group of more senior staff with some of the more routine duties and ensure matters are dealt with appropriately when they are out of the office.</p>
Reference Number	BM-2023-050