

Role Profile

Part A - Grade & Structure Information

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|-----------------|---------|-------------------------------|---------------------------|
| Job Family Code | SBF | Role Title | Pensions Trainee |
| Grade | PS5 | Reports to (role title) | Membership & Data Manager |
| JE Band | 161-191 | Director/School | Resources |
| | | Service/Department | Pensions |
| | | Date Role Profile was created | Mar-21 |

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 develop with the role holder. The Council reserves the right to review and amend the job families on a regular basis.

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| 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.</p> <p>As a Pensions Trainee, the role will:</p> <ol style="list-style-type: none"> 1. Undertake a specific program of training within the Service leading to broad understanding of all aspects of the scheme; 2. Carry out the processing of case work for new entrants and leavers of the scheme; 3. Assist with recording and logging of lost and hard copy communications; 4. Support the wider teams across Surrey Pension where required. <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"> • Ensure information and records are processed and stored to agreed procedures. • Assist in providing and manipulating basic data for statistical and other reports. May run and present standard reports. • Prepare and despatch a range of standard correspondence/documents to ensure an 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 enquiries from customers to provide a timely, courteous and efficient service. <p>Planning & Organising</p> <ul style="list-style-type: none"> • Support a group of senior staff, ensuring confidentiality, and assisting in the effective organisation of internal/external meetings and activities to support a high standard of office organisation. • Assess the range and volume of work to be undertaken for the days ahead and plan to ensure it is completed to time and to an appropriate standard. <p>Finance/Resource Management</p> <ul style="list-style-type: none"> • Follow established ordering procedures to ensure adequate resources are available to meet work requirements. <p>Work with others</p> <ul style="list-style-type: none"> • Receive visitors and provide/request basic information in a courteous manner to promote a positive image of the work unit. <p>Duties for all</p> <ul style="list-style-type: none"> • 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 | <ul style="list-style-type: none"> • Minimum 3 GCSEs at Grade C or above, or equivalent, or able to evidence ability at an equivalent level. • Familiar with one or more of the specific processes used in business, communication, financial or HR administration. • 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 provide excellent customer service. • Good written and oral communication skills with the ability to build sound relationships with staff and customers. • Ability to prioritise and plan own workload in the context of conflicting priorities. • Experience of working in a busy office environment. |
| Details of the specific qualifications and/or experience if required for the role in line with the above description | |
| Role Summary | <p>Roles at this level provide a business support service as part of a specific service or service team. They work within established processes and procedures, resolving problems or queries with the more complex issues referred to others. 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 procedures of their specialism. They will be subject to supervision but will be expected to organise their own workload and set their own priorities with short, e.g. day-to-day timescales. They 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. Some roles at this level may be more restricted in terms of variety or organisation of tasks than others. Where this is the case, customer service may be the predominant feature.</p> |

| Reason for Benchmarking - please complete the appropriate Business Case below | | |
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| Reason | Guidance for Business Case | Business Case |
| A - Creation of a new role | Please provide context to the creation of this new role. | |
| B - Creation of a new role as a result of a reorganisation | Provide context for the reorganisation. Please include sufficient detail to explain the extent of the reorganisation (team level, department level, etc) as well as the impact on the responsibilities associated with this profile. How has this work been carried out previously and why this is no longer appropriate or, if there are new tasks, why do they need to be undertaken? | Surrey Pension Team organisation re-design in order to support the aims and objectives of the newly integrated service following the dissolution of Pensions Administration from the Ombuds partnership and exiting of London Boroughs and SFRS. |
| C - The profile has been reviewed to more accurately reflect the existing duties of the current role | Please explain how the responsibilities of this profile have changed and what the impact of this has been on the team/department. Please state the current grade/level of the role and why the changed responsibilities sit appropriately at the proposed level. | |
| Date new role profile has been agreed with the role holder(s) Reason C of the business case only | | |
| Current grade of the position - Reason C of the business case | | |
| The below two fields to be completed by non-school roles only | | |
| OM Number of the position - Reason C of the business case | | |
| State all position numbers that are affected, if there is more than one position with the same role title and grade. Please note that all position holders have to agree. | | |
| Manager's OM Number this role reports to - Reasons A,B,C | | |

| Requesting manager's details | | | |
|---|--------------------------------------|--------------------------------|------------------------------|
| Manager's name | Manager's role title | | Date request submitted to HR |
| Neil Mason | Strategic Finance Manager (Pensions) | | 28/06/2021 |
| Approval Section | | | |
| Non-schools complete yellow parts, schools complete green parts | | | |
| Requesting manager to confirm: | | | |
| 1. Head of Service/Headteacher for schools approval for the creation/amendment of the role | | | |
| 2. Senior Manager confirmation of the available budget (non-schools) | | | |
| Please note that it is your responsibility to obtain the appropriate authorisations before the job profile is submitted for benchmarking. | | | |
| Position | Name | Date of approval | |
| Head of Service | Neil Mason | 28/06/2021 | |
| Senior Manager | Neil Mason | 28/06/2021 | |
| To be completed and approved by HR | | | |
| HR to confirm that the role is at a correct level within the particular Job Family | | | |
| Position Title | Name | Date confirmed benchmarking to | |
| | Alice Bloor | 28/07/2021 | |
| To be completed by JE Coordinator | | | |
| Reference Number | P&C 2021-1-383 | | |