

ROLE DESCRIPTION

Client Service Officer

Cluster	Stronger Communities
Division/Branch/Unit	NSW Trustee & Guardian (NSWTG)
Location	Parramatta/Newcastle
Classification/Grade/Band	Clerk Grade 3/4
ANZSCO Code	599215
Role Number	Generic
PCAT Code	1119192
Date of Approval	
Agency Website	www.tag.nsw.gov.au

Agency overview

Supporting over 35,000 customers annually and administering in excess of \$6bn in customer assets, NSW Trustee & Guardian (NSWTG) is a statutory agency within the Stronger Communities (formerly Justice) Cluster. The agency supports the Chief Executive Officer of the NSWTG and the Public Guardian (PG), to protect and promote the rights, dignity, choices and wishes of the people of New South Wales. We do this by providing independent and impartial financial management, guardianship and trustee services that support our customers and help them manage their health, lifestyle and financial affairs and ensure their wishes are respected.

Primary purpose of the role

The Client Service Officer (CSO) is part of the Trustee Services Division which is collectively responsible for delivering high quality services to customers that are reliable, timely and are consistent with NSWTG's customer excellence principles. The CSO will be expected to independently deal with client matters that may include transactions for clients, manage individual client caseloads and have a strong understanding of when to escalate a matter to the Senior CSOs and/or the Principal CSO as appropriate.

Key accountabilities

- Deliver high quality, consistent, empathetic and timely services to clients that are consistent with NSWTG's customer excellence principles.
- Ensure a coordinated approach to client matters by working closely with team members.
- Actively listen to the concerns and enquiries of clients and stakeholders and work to resolve issues across the different business streams.
- Work closely with staff from NSWTG Branches, Legal & Professional Service teams and Public Guardian to achieve quality outcomes focussed on customer need.

- Utilise the required systems and processes to support the management of client matters and actively suggest improvements.
- Escalate complex matters and substantial complaints to the Senior Client Service Officer or Principal Client Service Officer, as required.
- Actively role model NSWTCG's values and behaviours.

Key challenges

- Manage the delivery of outcomes, competing demands/priorities to generate favourable results for all clients/stakeholders as managed within the Service Centre Team.
- To utilise your transferable skills across the various business streams and Service Centres within NSWTCG.

Key relationships

Who	Why
Internal	
Principal Client Service Officer	To receive direction and escalate issues as necessary
Senior CSOs	To receive coaching on more complex matters
Legal & Professional Services	To obtain specialist information and advice for client matters
Branch Staff	To manage the provision of face to face services and outreach
Staff from other divisions within NSWTCG	To exchange relevant information and advice
External	
Clients, families and their representatives	Provide services, information and advice.
Client Service Providers	To provide quality services to clients through consultation

Role dimensions

Decision making

The role makes decisions within the relevant decision-making framework and NSWTCG's prescribed delegations

Reporting line

This role reports to the Principal Client Service Officer.

Direct reports

Nil

Budget/Expenditure

Nil

Essential requirements




- Understanding of NSW Government and NSW TG's key services and client base.
- Willingness to be a part of a rotating phone roster shared on an equitable basis covering morning and afternoon shifts (between the hours of 9.00am to 5.00pm).
- Willingness to have phone calls and team email accounts monitored for quality assurance and training purposes, and to participate in one to one review sessions for calls and emails.
- Understand the Department's Flexible Working Hours Agreement and to work within the required bandwidth.

Capabilities for the role


The NSW Public Sector Capability Framework applies to all NSW public sector employees. The Capability Framework is available at <http://www.psc.nsw.gov.au/workforce-management/capability-framework/the-capability-framework>

Capability summary

Below is the full list of capabilities and the level required for this role. The capabilities in bold are the focus capabilities for this role. Refer to the next section for further information about the focus capabilities.

NSW Public Sector Capability Framework		
Capability Group	Capability Name	Level
 Personal Attributes	Display Resilience and Courage	Foundational
	Act with Integrity	Intermediate
	Manage Self	Foundational
	Value Diversity	Foundational
 Relationships	Communicate Effectively	Intermediate
	Commit to Customer Service	Intermediate
	Work Collaboratively	Foundational
	Influence and Negotiate	Foundational
 Results	Deliver Results	Foundational
	Plan and Prioritise	Intermediate
	Think and Solve Problems	Intermediate
	Demonstrate Accountability	Intermediate

NSW Public Sector Capability Framework

Capability Group	Capability Name	Level
	Finance	Foundational
	Technology	Foundational
	Procurement and Contract Management	Foundational
	Project Management	Foundational

Focus capabilities

The focus capabilities for the role are the capabilities in which occupants must demonstrate immediate competence. The behavioural indicators provide examples of the types of behaviours that would be expected at that level and should be reviewed in conjunction with the role's key accountabilities.

NSW Public Sector Capability Framework

Group and Capability	Level	Behavioural Indicators
Personal Attributes Act with Integrity	Intermediate	<ul style="list-style-type: none"> • Represent the organisation in an honest, ethical and professional way • Support a culture of integrity and professionalism • Understand and follow legislation, rules, policies, guidelines and codes of conduct • Help others to understand their obligations to comply with legislation, rules, policies, guidelines and codes of conduct • Recognise and report misconduct, illegal or inappropriate behaviour • Report and manage apparent conflicts of interest
Relationships Communicate Effectively	Intermediate	<ul style="list-style-type: none"> • Focus on key points and speak in 'Plain English' • Clearly explain and present ideas and arguments • Listen to others when they are speaking and ask appropriate, respectful questions • Monitor own and others' non-verbal cues and adapt where necessary • Prepare written material that is well structured and easy to follow by the intended audience • Communicate routine technical information clearly
Relationships Commit to Customer Service	Intermediate	<ul style="list-style-type: none"> • Support a culture of quality customer service in the organisation • Demonstrate a thorough knowledge of the services provided and relay to customers • Identify and respond quickly to customer needs • Consider customer service requirements and develop solutions to meet needs • Resolve complex customer issues and needs • Co-operate across work areas to improve outcomes for customers
Results	Foundational	<ul style="list-style-type: none"> • Complete own work tasks under guidance, within set budgets, timeframes and standards

NSW Public Sector Capability Framework

Group and Capability	Level	Behavioural Indicators
Deliver Results		<ul style="list-style-type: none">• Take the initiative to progress own work• Identify resources needed to complete allocated work tasks• Seek clarification when unsure of work tasks
Business Enablers Finance	Foundational	<ul style="list-style-type: none">• Understand that government services budgets are limited and must only be used for intended purposes• Appreciate the importance of accuracy and completeness in estimating costs as well as calculating and recording financial data and transactions• Be aware of financial delegation principles and processes• Understand compliance obligations related to using resources and recording financial transactions