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ASSOCIATES



Providing our customers with  
a better tomorrow

# Head of Pensions- Resources

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April 2025

# Letter from Neil Mason, Director of Pensions – LGPS Senior Officer

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Dear Applicant

Thank you for your interest in joining the Surrey Pension Team as our Head of Pensions - Resources.

The Surrey Pension Team is a great place to work. We proudly work together as “one pensions team” to deliver our vision to provide our customers with a better tomorrow and ensure our pensioners can rely on us to pay them the right amount, on time, every time.

Our team has strong values that drive everything we do to deliver our mission of responsibly delivering a first-class customer experience every step of the way, through a relentless focus on delivering value to the customer; whether you’re an employer, employee, ex-employee or pensioner.

We are looking for an inspirational and proven strategic leader with a strong track record in leading continuous improvement activity across multiple resources disciplines in a pensions or similar environment. We want someone who can drive our vision and mission as well as motivating and being a role model for the team.

This needs not just an excellent professional, but someone who has the drive and passion to lead the engine room of the service, helping to build and foster a strong culture of standards and accountability to shape and deliver our Strategic Plan within a successful and supportive team. We hope that, after reading this information pack, you will want to join us at Surrey, and we look forward to receiving an application from you.

Yours sincerely



*Neil Mason*

Director – LGPS Senior Officer

## Working for the Surrey Pension Team

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There has never been a better time to join us here at the **Surrey Pension Team**. We have made great strides in our transformation over the past couple of years and have bold plans to go further so that we can deliver the best possible outcomes for our customers.

With assets of over **£6 billion**, the Surrey Pension Team looks after the benefits of over **130,000 members** and manages the relationship with more than **500 employers**.

Along with 10 other local authority pension funds, ranging from Cumbria to Surrey, we are proud partners in Border to Coast Pension Partnership, the LGPS pooling asset manager based in Leeds.

Our team is situated in Weybridge and this role offers the exciting opportunity to work across Surrey and the wider LGPS community.

The LGPS is entering a period of momentous change and through our strategic plan, we are well positioned to be at the forefront of the opportunity this will present.

**Ready for today, better for tomorrow.**



# Strategic Plan



## VISION

Providing our customers with  
a better tomorrow



## MISSION

Responsibly delivering a first  
class customer experience  
every step of the way

## CUSTOMER FOCUS

Relentless focus on delivering value to the customer



### COMPLIANCE

Ensuring best practice while  
delivering our statutory obligations



### READY FOR TODAY

Laser focused on continuously  
improving efficiency & effectiveness



### BETTER FOR TOMORROW

A confident organisation with the  
resilience & agility to meet challenges

PEOPLE

SYSTEMS & PROCESSES

COMMUNICATION

CULTURE & VALUES

# Our Journey to Date

## “One Pensions” Team

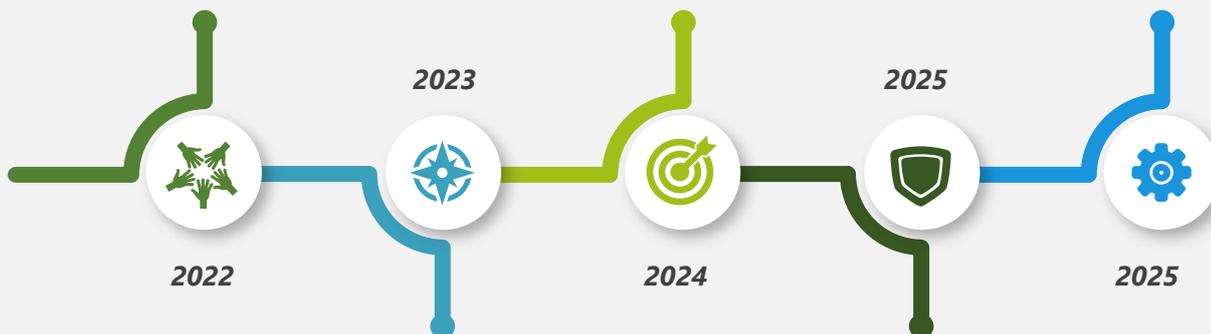
Creation of new Vision & Mission  
Restructured to bring together pension admin team and pension fund team under new structure and operating model lead by new Senior Leadership Team

## Customer mission

Mission refined to put customer more clearly at the centre

## Operating model

Redesigned from four to three areas



2022

2023

2024

2025

2025

## Development of 3-year strategic plan

Accelerating into our new organisation via a 3-year strategic plan to deliver our Vision and Mission

## Evolution of strategic plan

As we move out of transformation and into continuous improvement time to refresh and evolve our Strategic Plan Team



# Outline of New Model

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The Surrey Pension Team has recently been remodelled into three new service areas.

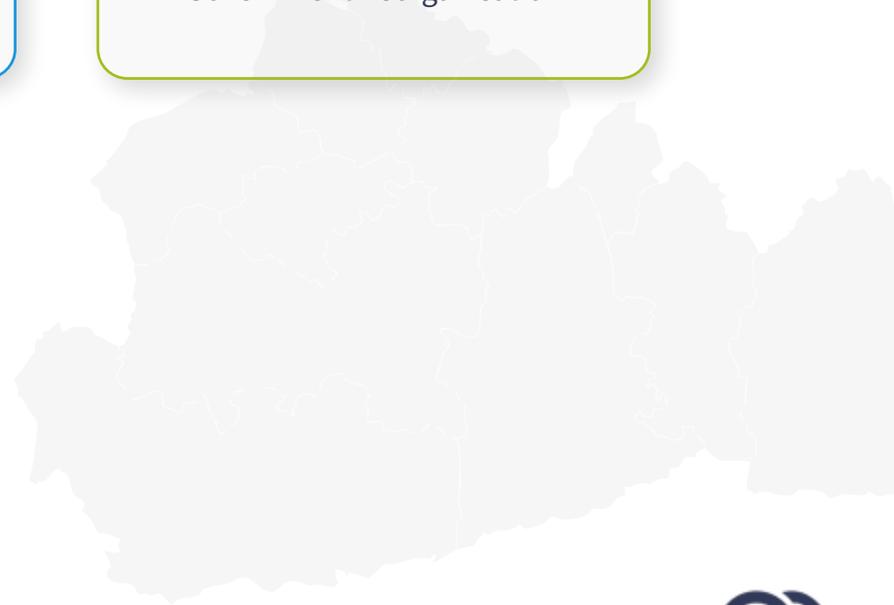
Our new model will:

**Provide a greater focus** on investment oversight and enable us to maintain our relationship with our pooling partner within the context of central government's "fit for the future" recommendations

**Enable an enhanced customer experience** by aligning key customer groups and delivering employer management alongside member benefits

**Deliver an increased focus on customer insight and data** to drive continuous improvement aligned to our refreshed mission

**Ensure we are prepared to proactively respond to changes** within the LGPS and wider Local Government environment including Devolution & Local Government Reorganisation



# SLT Structure

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## PREVIOUS STRUCTURE



## NEW STRUCTURE



# Head of Pensions Resources - Remit

As a member of the SLT, the Head of Pensions Resources will:

Work collaboratively with Senior Leadership colleagues to develop the Surrey Pension Team's strategic plan and champion the benefits of this to customers, staff and stakeholders

Translate the strategic plan into meaningful aims and objectives for the Resources function

Role-model the "one pensions team" mindset to enable successful delivery of the Surrey Pension Team mission to "responsibly deliver a first-class customer experience, every step of the way"

Provide proactive, professional and autonomous leadership, continuously seeking to improve performance by strengthening skills and competence and maintaining a strong culture of standards and accountability with specific responsibility for:



**FINANCE**



**HR & TRAINING  
DATA**



**PERFORMANCE &  
CUSTOMER INSIGHTS**



**SUPPLIER  
MANAGEMENT**



**MARKETING &  
COMMUNICATIONS**



**PROJECT  
SUPPORT**

# Head of Pensions Resources - Person Specification

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Demonstrable strategic level experience and a strong track record in leading Resources and continuous improvement activity in a pensions or similar environment.

Demonstrable experience of leading and managing multi-disciplined professional teams providing visible and supportive leadership and fostering high-performing cultures where individuals take personal accountability and strive for continuous improvement.

On behalf of the Senior Leadership Team, able to translate the Surrey Pension Team's strategic aims and objectives into a meaningful and tangible plan that resonates with staff, customers and stakeholders and which can be tracked and monitored.

Ability to articulate and demonstrate customer service excellence and drive continuous improvement for the benefit of customers and stakeholders monitored via service KPIs.

Able to demonstrate a high-level awareness and understanding of the wider political, business, economic, market, legislative and regulatory environment in which the Surrey Pension Team operates.

Able to demonstrate a high-level awareness and understanding of any changes taking place across organisations/services/the Local Government landscape and their potential impacts on the strategic plan.

Has a proactive approach for identifying problems, initiating preventative or mitigating action, whilst identifying critical dependencies/interdependencies and aligning these with the strategic plan.

**Note:** Whilst not listed as essential within the role profile, due to this post having responsibility for Finance within the remit, it would be beneficial if the successful candidate had an appropriate accounting qualification.

# ROLE PROFILE

## Part B - Job Family Description

Job Family Code	14BF	Role Title	Head of Pensions (Resources)
Grade	PS14	Reports to (role title)	Director of Pensions (LGPS Senior Officer)
		Directorate/School	Resources
JE Band	735-879	Service/Department	Surrey Pension Team
		Date Role Profile was created	Jan-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

As a member of the Senior Leadership Team, the role holder will work collaboratively with Senior Leadership colleagues to develop the Surrey Pension Team's strategic plan and will champion the benefits of this to customers, staff and stakeholders. As leader of the Resources function, the role holder will translate the strategic plan into meaningful aims and objectives for the Resources function and will role-model the "one pensions team" mindset to enable successful delivery of the Surrey Pension Team mission to "responsibly deliver a first-class customer experience, every step of the way".

They will provide proactive, professional and autonomous leadership, continuously seeking to improve performance by strengthening skills and competence and maintaining a strong culture of standards and accountability with specific responsibility for:

- Finance
- HR & Training
- Data, performance & customer insights
- Supplier management
- Marketing & Communications
- Project support

### 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 and pool oversight 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.

<p><b>Work Context</b></p>	<p>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 £6 billion, has more than 130,000 members and c.500 participating employers including councils, universities, colleges, academies and private companies providing public services.</p>
<p><b>Line management responsibility if applicable</b></p>	<p>Formal line management responsibility for professional staff (grades up to PS12), coaching and mentoring to support development of team members and tackling under-performance where appropriate. Provides day-to-day direction to line managed staff based on the agreed strategic plan.</p>
<p><b>Budget responsibility if applicable</b></p>	<p>Contributing to the management of the overall Pension Team budget c.£8m</p>
<p><b>Representative Accountabilities</b> Typical accountabilities in roles at this level in this job family</p>	<p>Develop, co-ordinate and support service planning for the service or functional area to ensure the delivery of high quality, value for money and consistent services in line with agreed service standards and statutory requirements.</p> <p>Develop, and recommend policy and practice improvement in the relevant service/-functional area, working collaboratively across the area and consulting with key stakeholders, to ensure effective implementation that supports continuous improvement.</p> <p>Provide professional leadership to the team/s and/or colleagues, strengthening skills and competence and fostering a strong culture of standards, performance and accountability to deliver public value and efficiency.</p> <p>As a lead expert in a specialised field provide timely, accurate and customer focused advice and guidance to managers to support good practice and compliance with statutory requirements.</p> <p>Maintain effective budgetary control, while ensuring legal, regulatory and policy compliance within area of responsibility are effectively managed, and that effective systems operate to manage performance and risk.</p> <p>Lead major programmes and reviews and represent the business area in internal and/or external initiatives to enhance reputation and service delivery.</p> <p>Champion and manage transformational change and embed new ways of working to ensure high quality service delivery and value for money.</p> <p>Work collaboratively internally and externally to ensure that issues are effectively managed and foster partnership working to promote sustainable service improvements and generate efficiencies.</p>

<p><b>Representative Accountabilities</b> Typical accountabilities in roles at this level in this job family</p>	<p>Able to demonstrate a high-level awareness and understanding of any changes taking place across organisations/services/the Local Government landscape and their potential impacts on the strategic plan.</p> <p>Ability to use appropriate financial/pensions and nonfinancial/pensions information in formulating advice and making decisions.</p> <p>Has a proactive approach for identifying problems, initiating preventative or mitigating action, whilst identifying critical dependencies/interdependencies and aligning these with the strategic plan.</p>
<p><b>Role Summary</b></p>	<p>Roles at this level are senior managers leading the provision of a multi functional support service within one of the organisation's service areas, or coordinating a specific business development or advisory area. Role holders are often members of the departmental or service management team and will help to develop the service's strategic aims and objectives. They require expertise in a specialised field or a broad understanding of relationships between different fields, and advise managers and colleagues on good practice and compliance with statutory requirements. This level requires the ability to select, develop and assess the suitability of ways of working, together with highly developed skills in persuading, influencing, developing and motivating people and partnerships to achieve service objectives. Role holders exercise flexibility and independence for decision making within their particular functional area, working to broad parameters and policy guidance.</p>
<p><b>Reference Number</b></p>	<p>BM-2025-018</p>

## How to Apply

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For a more in-depth conversation about the role please contact **Rebecca Martin**, Principal Delivery Consultant, who is leading on the process.



**Rebecca Martin**  
[r.martin@panoramicassociates.co.uk](mailto:r.martin@panoramicassociates.co.uk)

We hope you will consider making an application for this fantastic opportunity. To make an application you will need the following –

### **A CV, tailored for the role**

A supporting statement that sets out your understanding of both the role and the organisation, and how your experience matches the key criteria on the personal specification.

**NB** – Given the competition within the market at the moment, there is a degree of flexibility in exceptional circumstances so please contact Panoramic Associates if the need arises.

We know we have challenges ahead and need to change significantly and quickly. We will only be able to achieve our aims with your full support and by working together, united in our vision and intent.

**We look forward to hearing from you!**

