

Role Profile

Part A - Grade & Structure Information

Job Family Code	10BF	Role Title	Finance Manager
Grade	PS10	Reports to (role title)	Senior Manager - Finance
		Directorate/School	Resources
JE Band	371-438	Service/Department	Pensions
		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 a significant contribution to the success of the Surrey Pension Team. Operating with 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). This role will have specific responsibility for leading a small team across financial matters of the Surrey Pension Fund to deliver key operational works that include: 1.contributing to the delivery of the Surrey Pension Team Finance Strategy including preparation of the annual Pension Fund accounts and Annual Report, 2.ensuring key financial controls are robust, monitoring both the service operating budget and the Fund budget, 3.assisting with the day-to-day management of the Finance Team work , 4.liaising with key stakeholders including the Pension Fund Committee, the Local Pension Board, employers, auditors, actuaries, funding managers, custodians, and the Fund pool and its partners. Actively seek and support the delivery of continuous improvement through process improvement and digital initiatives in line with service priorities, that will improve operational efficiency and customer experience. The role will adopt the Surrey Pension Team culture of strong standards and accountability in order 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	Line management responsibility for a team. Tasks associated with line management including (but not limited to) providing day to day direction based on the strategic direction set by the Senior Leadership Team, coaching and mentoring to support development, tackling under-performance, undertaking regular performance conversations and ensuring these are taking place for staff at lower grades.
Budget responsibility	Contributes to the necessary monitoring, analysing and managing the Surrey Pension Team budget, currently circa £7m along with the cashflow and forecasts for the Surrey Pension Fund (circa £6bn).

Representative Accountabilities Typical accountabilities in roles at this level in this job family	Analysis, Reporting & Documentation - Assess or conduct analysis, presenting results and putting forward recommendations on managing more complex situations to support decision making. - Analyse and make recommendations for improvement or development of existing systems, processes or policy. Service Delivery - Maintain, develop and review systems, processes, procedures and working methods to maximise service delivery, quality, efficiency and compliance. - Provide specialist/professional advice and recommendations within defined policy/strategy and procedures to support informed decision making. Planning & Organising - Plan workloads and secure resources to enable the team/s to achieve a quality service. - Lead projects and reviews within a defined area of work as directed by manager to support and enhance service delivery. Finance/Resource Management - May assist with budget/resource/funding management in accordance with the organisation's policies and procedures. - May have delegated responsibility for a budget(s). 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. People Management - May manage a team operating in a well defined specialist area or oversee the delivery of a range of support services to a service or function. - Monitor and support the performance management and development of team members to ensure that individual contributions are maximised. And/Or - Operate as an individual responsible for the delivery of a high level and complex service. 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 be responsible for ensuring health & safety policies, procedures and legislation are implemented, communicated and managed including making sure that health and safety responsibilities are fully understood and carried out by employees within their service area. To have regard to and comply with safeguarding policy and procedure as appropriate.
Education, Knowledge, Skills & Abilities, Experience and Personal Characteristics	- Degree qualified, or significant vocational experience demonstrating development through involvement in a series of progressively more demanding relevant work/roles. - Professional qualification, or able to evidence knowledge and understanding of appropriate business disciplines. - Comprehensive knowledge of computerised business systems in terms of functionality and capability (some roles). - Knowledge of principles, practices, policies and procedures relating to business planning and financial and organisational management. - Proven written and oral communication and interpersonal skills with good negotiation and influencing skills and the ability to work collaboratively with internal and external partners/professionals. - Ability to understand, meet and exceed customer expectations. - Proven problem solving skills, and the ability to exercise high levels of initiative to devise and implement workable solutions. - Proven ability to manage a range of projects through to completion. - Significant practical or professional experience and understanding of business, supporting service teams and/or providing support to the public. - Previous management experience including staff supervision, development and organisational skills.
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 financial/pension insights and options effectively with a non-finance/pension audience - Embraces change and role models adaptability and a positive approach. Regularly seeks and offers feedback - An accountancy qualification, e.g. ACA (Chartered Accountant), ACCA (Association of Chartered Certified Accountants), or CIPFA (Chartered Institute of Public Finance and Accountancy) - Knowledge and understanding of public sector financial/pensions issues and best practice (including statutory regulations and guidance) - Knowledge and understanding of public sector accounting requirements and the structure of local authority/pension accounts - Ability to perform tasks within a financial/pensions management cycle - Ability to analyse and interpret complex financial/pensions information - 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 - Knowledge of, and proficiency in, financial/pensions modelling techniques

Role Summary	Roles at this level lead and manage the work of larger teams, or a grouping of two or more teams with a common theme. Alternatively they may be professional roles undertaking research and providing complex advice and/or managing specialist projects. They will plan and ensure progress within established procedures and policy, and respond effectively to changing priorities and different situations. They will work closely with customers, staff, partners, third parties, agencies and/or contractors and have a primary role ensuring their services achieve the agreed service standards in a cost effective way and improving quality standards. Forward planning could be for months ahead and the role will contribute to longer-term development. Work requires the consideration of future implications beyond the immediate problems and may involve the creation of new approaches and procedures to solve the problem.
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