



# SURREY LOCAL PENSION BOARD REPORT

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**SURREY COUNTY COUNCIL**

**SURREY LOCAL PENSION BOARD**

**DATE: 21 FEBRUARY 2025**

**LEAD OFFICER: NEIL MASON, LGPS SENIOR OFFICER**

**SUBJECT: CHANGE MANAGEMENT UPDATE**

## **SUMMARY OF ISSUE:**

This paper details the Change Team Quarterly Report of activity for the period October - December 2024.

## **RECOMMENDATIONS:**

It is recommended that the Local Pension Board:

1. Note the content of this report.

## **REASON FOR RECOMMENDATIONS:**

To provide an update to the Local Pension Board (Board) and stakeholders on the Change Management team activities.

## **DETAILS:**

1. This report details the following areas of interest:
2. Communications
  - a) Over the last quarter the Communications team have sent out all planned communications within the agreed timelines as set out by the Communication policy.
  - b) The Surrey Pension Team were nominated for the Defined Benefit Scheme of the Year award at the 2025 Pension Age Awards. The awards ceremony will be held in early March 2025.
  - c) Produced and launched the second in a suite of video interviews in line with the priorities set out in our Strategic Plan. The [video](#) describes Surrey Pension Team's views on Responsible Investment.
  - d) Created a Communications calendar and social media plan for 2025.
  - e) A findings report from the Employer Customer Insight project was shared with Employers.

### 3. Learning & Development

- a) The Staff Pulse Survey was launched in December and the results will be reported at the next Board meeting.
- b) A Lunch and Learn session was presented on Unconscious Bias, which happens when an individual is unaware of a prejudice but tends to form opinions about others, based on stereotypes or past experiences, without having enough relevant information.
- c) The residential Board & Committee training event took place as planned and feedback was very positive. We are looking to plan the next residential event for October 2025.
- d) We have started work on the Continuous Improvement programme and have formed a working group to progress this.
- e) A proposal to evolve our Trainee programme was presented to PSLT.
- f) The first session of our second year of Talking Talent took place, where individuals' development aspirations were discussed and actions to facilitate these agreed.

### 4. Project Management

- a) 1 project has been completed.
- b) 6 projects are still ongoing and are on track. Further information is provided in Annexe 1.
- c) The most significant projects currently on the agenda are McCloud and GMP.
- d) We are revamping the Project Review Board format to improve visibility of all projects across the Surrey Pension Team which will launch in January 2025.

### 5. Transformation

- a) We have now appointed 2 external suppliers to support our Digital transformation plans. The first will assist with horizon scanning to inform the outer years of our digital transformation plans. The second will complete discovery analysis to advise on a digital solution for digitising common customer forms and removing manual reconciliation processes in Accounting and Governance.
- b) We are currently recruiting for a Service Level Manager to discover and codify the systems and services we receive from SCC. This will enable us to set service level agreements.
- c) A programme of "High Performance" team workshops was kicked off to allow teams to focus on ensuring they are laser focused on what they deliver to their internal customers and also to allow them to establish team ways of

working. This programme will run for circa 3 –4 months spanning all teams in the service.

**CONSULTATION:**

6. The Chair of the Local Pension Board has been consulted on this report.

**RISK MANAGEMENT AND IMPLICATIONS:**

7. Any relevant risk related implications have been considered and are contained within the report.

**FINANCIAL AND VALUE FOR MONEY IMPLICATIONS:**

8. Any relevant financial and value for money implications have been considered and are contained within the report. The cost of the resources necessary for implementing the changes recommended above and for delivering the administering authority role is met from the pension fund (under Regulation 4(5) of The Local Government Pension Scheme (Management and Investment of Funds) Regulations 2009).

**LEGAL IMPLICATIONS – MONITORING OFFICER:**

9. There are no legal implications or legislative requirements.

**EQUALITIES AND DIVERSITY:**

10. There are no equality or diversity issues.

**OTHER IMPLICATIONS:**

11. There are no other implications.

**NEXT STEPS:**

12. The following steps are planned:

- a) Work will commence on the Digital Transformation strategy utilising the external vendors.
- b) The High Performance Teams programme will continue throughout the next quarter.
- c) Training will be created for processing McCloud tasks.
- d) The revised Project Review Board will be launched.
- e) Further Lunch and Learn sessions to support our workforce strategy will be delivered.
- f) The revised 'New Joiner' webinars will be organised and begin for 2025.
- g) New materials for members will be produced covering the new online retirement process.
- h) 4<sup>th</sup> Staff Pulse Survey results will be analysed, actioned and shared.

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**Contact Officer:**

Nicole Russell, Head of Change Management

**Annexes:**

1. Projects October - December 2024 Annexe 1

**Sources/Background papers:**

1. None