

## 2<sup>nd</sup> Dispatch – Amended Report

# Surrey Local Firefighters' Pension Board



**Date & time**  
Wednesday, 18  
November 2020 at  
1.00 pm

**Place**  
REMOTE

**Contact**  
Angela Guest  
Room 122, County Hall  
Tel 020 8541 9075

**Chief Executive**  
Joanna Killian

angela.guest@surreycc.gov.uk

### **Elected Members**

Mr Nick Harrison (Member Representative (Firefighters' Pension Scheme)) (Chairman)

### **Independent Representatives:**

Richard Jones (Employee Representative (Firefighter's Pension Scheme)), Glyn Parry-Jones (Employee Representative (Firefighters' Pension Scheme)) and Dan Quin (Employer Representative (Firefighters' Pension Scheme)) (Vice-Chairman)

## **SUPPLEMENTARY PAPER**

### **6 ADMINISTRATION UPDATE: 1 JULY 2020 - 30 SEPTEMBER 2020**

(Pages 5  
- 8)

**This is an amended version of the main report from the first agenda published.**

The Board is asked to note the content of this report and make recommendations if any further action is required.

**Joanna Killian**  
**Chief Executive**

Published: Friday, 13 November 2020

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## **Surrey Firefighters Local Pension Board October 2020**

### **Administration Update 1 July 2020 – 30 September 2020**

#### **Recommendations:**

The Board is asked to **note** the content of this report and make recommendations if any further action is required.

#### **Background**

1. The terms of reference for the Board includes the duty to;

*“...help ensure that the Firefighters’ Pension Scheme is managed and administered effectively and efficiently and complies with the Code of Practice on the governance and administration of public service pension schemes issued by the Pension Regulator”.*

2. In order to help the Board to measure the effectiveness of the administration of the scheme a set of administrative functions from 1 September 2019 to 31 December 2019, and an update of performance and current issues is set out below and in the attached Annex.

#### **Administration Performance**

3. Details of all cases completed between 1 July and 30 September 2020 can be found in **Annex 1**.
4. As agreed at the previous Board meeting, the SLA reporting that is currently in place for Surrey LGPS has been adopted by Surrey Fire going forward.
5. This report includes number of outstanding cases at the start of the period, SLA performance and number of outstanding cases at the end of the period.

6. The end of year and annual benefit statement production was successful this year, with all statements that could be produced having been done so by the statutory deadline of August 31 2020.

151 deferred statements were produced. 532 statements were produced for active members. There were 70 rejected records in total, mostly due to records marked as gone away. It would be the recommendation of the administration service to undertake address tracing in January 2021.

7. Annual Allowance was successfully delivered to all those members within the Fire and Rescue Service. The breakdown of numbers is shown below:
  - a) Total members identified on report as potentially exceeding the Annual Allowance was 12 members
  - b) Total number identified as not exceeding the Annual Allowance and records rectified to reflect this was 1 member
  - c) Total number of cases where the members were written to by 06.10.20 where they exceeded the AA and were written to was 10 members
  - d) Total number of cases where we are awaiting further information from previous employing authority was 1 member
8. We have identified 180 outstanding tasks in our administration system that require action. These include a mixture of records pending deferring, quotation requests, transfers in/out and some general correspondence.

Using some expertise in the fire scheme from our Lewes office, we have been able to utilise a team of 3 people to firstly undertake some analysis on these cases and then begin processing them as required.

To date, 30 of these cases have now been completed. We have received the pay data from Surrey payroll to process another 20 deferred cases and awaiting more data in the coming weeks to process further cases. In addition to this, we have reviewed all letters attached to the transfer in/out process to remove a further 25 pending items.

This will significantly reduce any key work areas on a short-term basis to help support the services longer term plans of sourcing a new administration provider.

## **Fire Bulletins**

The Pensions Board has adopted a procedure to ensure that any FPS Bulletins released by LGA are reviewed and any necessary actions are noted and tracked through to completion.

9. Bulletins 35, 36 & 37 (**Annex 2**) have been published since the last Board meeting.
10. Bulletin 35 showed that on 16 July 2020, HM Treasury (HMT) published their consultation on proposals to remove age discrimination from the unfunded public

service pension schemes in line with the result of the McCloud/Sargeant case.

11. Bulletin 36 & 37 raised the request from the Home Office for all FRAs to submit the forecast for their income and expenditure for 2019/20 – 2025/26. The request asked for:
  - a. The online DELTA returns setting out the 6-year forecast of pension income and expenditure.
  - b. 2. Assumptions returns (email direct to [anthony.mooney@homeoffice.gov.uk](mailto:anthony.mooney@homeoffice.gov.uk) attaching the completed table above).

## **Pensions Helpdesk**

1. With only 5.5 FTE available to take calls after a member of the team had left, a reduced telephony service continues to be offered to ensure the wellbeing of staff and maintain service continuity. The Helpdesk phonelines are open between 10:00 to 12:00, and 14:00 to 16:00. The phone lines are open Monday- Friday. As of the 2<sup>nd</sup> November the phone line will be open from 09:00-12:30, and 13:30-16:00.
2. The Helpdesk has received its ever-highest volumes peaking to 7739 in August. There is currently 800+ emails pending in the inbox due to the high demand of queries caused by the end of year season. The team have dedicated resource to work through these on a daily basis to reduce numbers, prioritising cases in line with service KPIs.
3. In addition, the main queries being received by the Helpdesk relate to transfers and retirements.
4. The helpdesk is currently recruiting for replacement staff due to three resignations received within the past 2 weeks. Two of these staff members have agreed to remain on bank contracts during the transition of new staff joining the team over the coming weeks.

## **Summary**

12. The Board is asked to note the update provided/actions required and to advise if any further reporting will assist the Board in monitoring of administration performance.

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### **Sources/background papers:**

Surrey Local Pension Board Terms of Reference

**Annexes**

Annex 1 – SFRS Jul - Oct 2020 KPI Report

Annex 2 – FPS Bulletins 35, 36 & 37