

## SUPPLEMENTARY AGENDA

# Surrey Local Firefighters' Pension Board

**Date & time**

Thursday, 27 April  
2023 at 10.30 am

**Place**

Committee Room,  
Woodhatch Place, 11  
Cockshot Hill, Reigate,  
Surrey, RH2 8EF

**Contact**

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**Chief Executive**

Joanna Killian

## SUPPLEMENTARY AGENDA

**7 XPS - SURREY FIRE & RESCUE AUTHORITY PENSION BOARD REPORT**

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Members to note a report from XPS for 2022/2023 – Q4

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

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# **Surrey Fire & Rescue Authority**

## **Pension Board Report**

2022/2023 – Q4

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# 01 Overview

## Regulations and Guidance

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### January 2023

LGA issued bulletin 65

Key points:-

Ill-health reassessment factsheet updated:

The factsheet has been updated to include FPS2006 special members.

Template member consent letters

Letters for scenarios one, two, seven and nine as referred to in the ill-health reassessment factsheet have been added to the retrospective remedy webpage.

Potential Industrial Action:

LGA are planning to provide sample communications for FRA's if industrial action goes ahead and members wishing to repay the missing period of service.

Actions required: -

Template Ill-Health reassessment letters:

FRA's to identify affected members of the pension scheme who may need to be sent for an ill-health reassessment and arrange for the appropriate member consent letter to be sent to him.

SAB levy 2022-23 – request for Purchase Order numbers:

FRA's to provide a valid purchase order number, stating the number of employees eligible to join one of the Firefighters' Pension Schemes as of 1<sup>st</sup> April 2022, using the form provided with the SAB 2022-23 levy letter.

### February 2023

XPS attended the Fire Technical Working Group – 17<sup>th</sup> February 2023

LGA issued bulletin 66

Key points:-

New webpage on the FPS member website

The webpage relating to the 2015 remedy is now available for members on FPS member website.

FPS Contribution Bandings for 2023-24

The contribution banding factsheet which confirms the contribution rates that apply for 2023-24 as set out in the scheme regulations is now available and confirms that there are no changes to the relevant rates for 2023.

Matthews pre-work factsheet for FRA's

Matthews pre-work factsheet is now available which is designed to help FRA's to identify the work which should be done before the Matthews legislation comes into force.

Actions required: -

Data collection for 2015 remedy

FRA's to ensure that the data collection template is completed and sent to administrators so that administrators and FRA's are prepared for the implementation of remedy from 1 October 2023

Pension scheme migration

Migrate to the managing pension schemes service as soon as possible.

The Bereavement benefits remedial order 2022

FRA's and administrators to share this information in communication with pensioners

## Additional Work / Previous Minutes

### **Use of tracing service to confirm addresses for those members approaching, or beyond, Normal Retirement Age**

The address tracing exercise was submitted and received through our supplier.

There are a number of addresses returned which the team are working through as part of the daily work and we will be able to provide a verbal, or supplementary update to this report to demonstrate the success of this.

There is one member who exceeds normal pension age for a deferred beneficiary who is overseas.

Checking those close to normal pension age at deferred benefit status shows that options have already been sent to bring benefits into payment.

### **Conditional Data Testing**

Our work is ongoing to map the entire Firefighter Pension Schemes to a Conditional Data testing facility within XPS which will give a conditional data score. This is a prerequisite to being able to prove that we are 'Dashboard Ready' in advance of connecting to MAPS Dashboard service in late 2024.

We will also receive a refresh of the common data which will include more tests to prove the quality of this data. Once available, we will submit a data report into the Service.

### **National Fraud Initiative**

Towards the later part of 2022, information was submitted to the National Fraud Initiative as it is done every two years. Queries are now available which the team are working through, this ensures there is no undeclared or unintended cross-over of benefits in payment from the Firefighters Pension Scheme and the state benefit system.

### **Year end Data Templates**

The templates for the collection of year end information have been sent. The requirements are somewhat simplified from last year's request due to the 2015 scheme being the only scheme containing active members.

The deadline for return of this is the 15<sup>th</sup> May and following receipt of this, we will update all active member records with contributions and pension accrual data for the 2022/ 2023 scheme year.

# 02 Member Self Service

Analysis for member self service when compared to the previous quarter shows an increase across all membership cohorts.

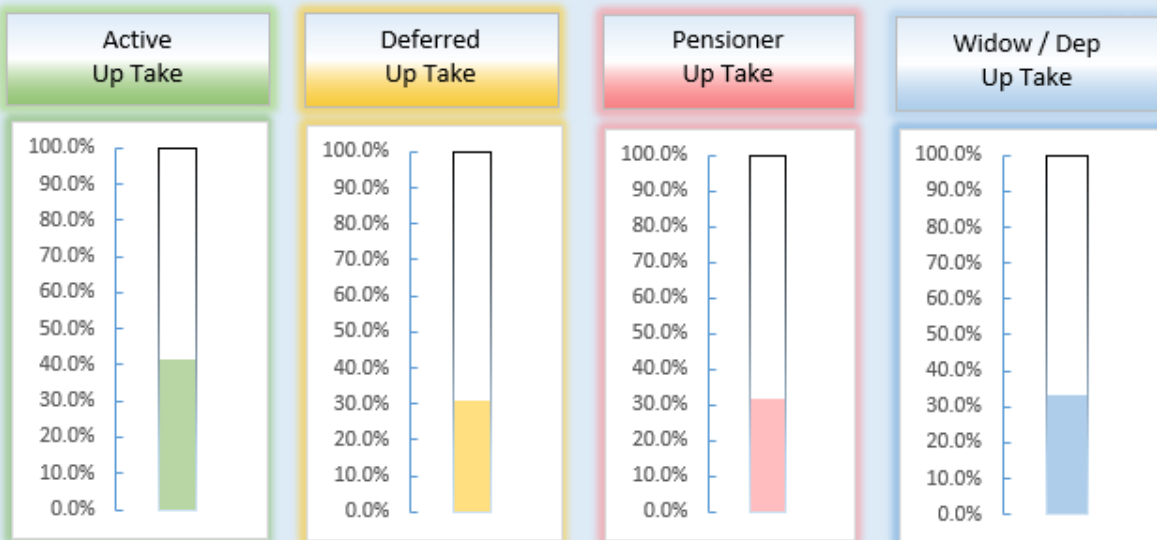


## Member Self Service Statistics For Scheme: Surrey Fire

Quarter 4	REGISTERED	ACCOUNT DISABLED	ACTIVATION LINK SENT	NOT REGISTERED	TOTAL	% Up Take
Actives	234	0	12	320	566	41.3%
Deferred	85	0	4	184	273	31.1%
Pensioner	263	5	13	563	839	31.9%
Widow/Dep	21	0	0	132	153	13.7%
<b>Total</b>	<b>603</b>	<b>5</b>	<b>29</b>	<b>1,199</b>	<b>1,831</b>	<b>33.2%</b>

### Fire Authority Averages for comparison

	REGISTERED	ACCOUNT DISABLED	ACTIVATION LINK SENT	NOT REGISTERED	TOTAL	% Up Take
Actives	13.9%	0.1%	1.0%	13.9%	746	13.9%
Deferred	5.1%	0.1%	0.3%	14.4%	272	5.1%
Pensioner	13.3%	0.3%	0.7%	30.1%	713	13.3%
Widow/Dep	0.6%	0.0%	0.0%	6.8%	34	0.6%
<b>Total</b>	<b>32.9%</b>	<b>0.4%</b>	<b>1.9%</b>	<b>65.2%</b>	<b>1,765</b>	<b>32.9%</b>



### Age Profiles for Actives who have registered for self service

<b>Under 22</b>	0.85%	<b>Aged 46 - 50</b>	26.50%
<b>Aged 23 - 25</b>	0.00%	<b>Aged 51 - 55</b>	26.50%
<b>Aged 26 - 30</b>	5.98%	<b>Aged 56 - 60</b>	2.56%
<b>Aged 31 - 35</b>	9.40%	<b>Aged 61 - 65</b>	1.71%
<b>Aged 36 - 40</b>	8.12%	<b>Aged 65+</b>	0.43%
<b>Aged 41 - 45</b>	17.95%		



## 03 Common Data

Surrey Fire				57	▼
Data Test	Common data score			Previous Quarter	
	Max Populati	Total Fails	% OK	Total Fails	% OK
<b>NINO</b>	2293	2	99.91%	2	99.91%
<b>Surname</b>	2293	0	100.00%	0	100.00%
<b>Forename / Inits</b>	2293	0	100.00%	0	100.00%
<b>Sex</b>	2293	0	100.00%	0	100.00%
<b>Title</b>	2293	0	100.00%	0	100.00%
<b>DoB Present</b>	2293	0	100.00%	0	100.00%
<b>Dob Consistent</b>	2293	0	100.00%	0	100.00%
<b>DJS</b>	2293	0	100.00%	0	100.00%
<b>Status</b>	2293	0	100.00%	0	100.00%
<b>Last Status Event</b>	2293	1	99.96%	1	99.96%
<b>Status Date</b>	2293	18	99.22%	18	99.22%
<b>No Address</b>	2293	11	99.52%	13	99.44%
<b>No Postcode</b>	2293	17	99.26%	19	99.17%
<b>Address (All)</b>	2293	56	97.56%	55	97.61%
<b>Postcode (All)</b>	2293	62	97.30%	61	97.35%
<b>Members with a Fail</b>	2293	25	98.91%	25	98.91%
<b>Members with Multiple Fails</b>	2293	57	97.51%	56	97.57%
<b>Total Fails</b>	2293	82	96.42%	81	96.48%

The Common Data reports are run on a quarterly basis, just after the quarter end.

Data quality is good and where we have failures here, it is likely that at least for some of them, they cannot be rectified.

An example of this is the NI Number – we currently pay pensions to people of all ages. For Surrey Fire and Rescue, your oldest dependent is 101 and the youngest 9.

For children in receipt of a dependents pension, they will not receive a NI Number of their own until they reach age 16. We therefore have to create a temporary NI Number which carries a prefix of TN, this is not a recognised NI Number, and will therefore fail the NI Number quality test. These will naturally be resolved in the passing of time.

The tests for Title are quite specific. Missing titles will fail, as will some of the lesser-known titles. Occasionally, if a member set has been imported and there are additional spaces within the Title field, these can also cause fails.

Address / Post Code Fails can occur either where the data is missing, or, where the address does not meet the standards as dictated by the UK postal service. Typically, we see that the deferred cohort are those with the most missing fails and overseas address can fail as they do not meet UK standards for format / layout.

# 04 Membership

This table is designed to be a very quick, at a glance, display of the membership movements within the schemes. This will be provided on a quarterly basis at each meeting on a rolling year basis.

## Quarter 4 2022 - 2023

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	0 -	71 ▼	797 ▲	141 -	8 -
New-NFPS	2 -	100 ▲	21 -	1 ▲	0 -
CARE - 2015	565 ▼	103 ▲	21 ▲	2 -	1 -
<b>Total</b>	<b>567 ▼</b>	<b>274 ▲</b>	<b>839 ▲</b>	<b>144 ▲</b>	<b>9 -</b>

## Quarter 3 2022 - 2023

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	0 -	72 ▼	790 ▲	141 ▲	8 -
New-NFPS	2 -	96 ▲	21 ▲	0 -	0 -
CARE - 2015	587 ▼	92 ▲	15 ▲	2 -	1 -
<b>Total</b>	<b>589 ▼</b>	<b>260 ▲</b>	<b>826 ▲</b>	<b>143 ▲</b>	<b>9 -</b>

## Quarter 2 2022 - 2023

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	0 -	75 ▲	787 ▲	140 ▼	8 -
New-NFPS	2 ▼	93 ▼	20 ▲	0 -	0 -
CARE - 2015	599 ▲	87 ▲	12 ▲	2 -	1 -
<b>Total</b>	<b>601 ▲</b>	<b>255 ▲</b>	<b>819 ▲</b>	<b>142 ▲</b>	<b>9 -</b>

## Quarter 1 2022 - 2023


Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	0 ▼	76 ▼	782 ▼	141 ▼	8 -
New-NFPS	4 ▼	94 ▲	19 ▲	0 -	0 -
CARE - 2015	521 ▼	83 ▲	7 ▲	2 ▼	1 -
<b>Total</b>	<b>525 ▼</b>	<b>253 ▼</b>	<b>808 ▼</b>	<b>143 ▼</b>	<b>9 -</b>

## Previous Quarter 4

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	19 ▼	72 -	770 ▲	144 ▲	8 ▼
New-NFPS	8 ▼	93 ▲	18 ▲	0 -	0 -
CARE - 2015	540 ▼	60 ▲	4 -	3 -	1 -
<b>Total</b>	<b>567 -</b>	<b>225 -</b>	<b>792 -</b>	<b>147 -</b>	<b>9 -</b>

Please note all active member records have been moved across to the 2015 scheme with effect from 1/4/2022. The reducing active numbers within non-CARE – 2015 are where records are being cleansed. The two record still denoted as in legacy schemes are to be deleted.

# 05 Completed Cases Overview

 Surrey Fire	Cases completed	Cases completed within target	Cases completed outside target	Cases: % within target
April	58	43	15	74%
May	64	44	20	69%
June	65	61	4	94%
<b>Quarter 1</b>	<b>187</b>	<b>148</b>	<b>39</b>	<b>79%</b>
July	49	35	14	71%
August	41	37	4	90%
September	42	37	5	88%
<b>Quarter 2</b>	<b>132</b>	<b>109</b>	<b>23</b>	<b>83%</b>
October	47	46	1	98%
November	41	40	1	98%
December	23	23	0	100%
<b>Quarter 3</b>	<b>111</b>	<b>109</b>	<b>2</b>	<b>98%</b>
January	46	45	1	98%
February	44	40	4	91%
March	47	44	3	94%
<b>Quarter 4</b>	<b>137</b>	<b>129</b>	<b>8</b>	<b>94%</b>
<b>Year - Total</b>	<b>567</b>	<b>495</b>	<b>72</b>	<b>87%</b>

This table is designed to be a very quick, at a glance, display of the total cases completed within the year.

Further details on specific workflows are shown below.

## 06 Completed Cases by Month

Here we break down the performance of XPS month by month. Each month is split out into its own table with the fifteen main KPI's listed with performance set out against each of them.

### January 2023

January 2023					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	1	1	100
Deferred Benefits	10	90	6	6	100
Divorce Cases	30	100	1	1	100
Estimates	10	100	5	4	80
General	10	100	15	15	100
Processing new entrants	10	90	1	1	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	5	5	100
Retirement Options	10	100	3	3	100
Transfers – in (Calculation)	10	90	1	1	100
Transfers – in (Payment received)	10	90	0	0	0
Transfers – Out (Calculation)	10	100	0	0	0
Transfers – Out (Payment)	10	100	0	0	0
Variations	10	90	8	8	100

### February 2023

February 2023					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	2	2	100
Deferred Benefits	10	90	2	2	100
Divorce Cases	30	100	0	0	0
Estimates	10	100	4	3	75
General	10	100	21	19	90
Processing new entrants	10	90	2	2	100
Refunds	10	100	1	1	100
Retirement Actual	10	100	3	3	100
Retirement Options	10	100	2	2	100
Transfers – in (Calculation)	10	90	0	0	0
Transfers – in (Payment received)	10	90	0	0	0
Transfers – Out (Calculation)	10	100	1	0	0
Transfers – Out (Payment)	10	100	0	0	0
Variations	10	90	6	6	100

## March 2023

March 2023					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	1	1	100
Deferred Benefits	10	90	4	4	100
Divorce Cases	30	100	1	1	100
Estimates	10	100	6	5	83
General	10	100	16	15	94
Processing new entrants	10	90	0	0	0
Refunds	10	100	0	0	0
Retirement Actual	10	100	2	2	100
Retirement Options	10	100	4	3	75
Transfers – in (Calculation)	10	90	0	0	0
Transfers – in (Payment received)	10	90	0	0	0
Transfers – Out (Calculation)	10	100	0	0	0
Transfers – Out (Payment)	10	100	0	0	0
Variations	10	90	13	13	100

## Task analysis

### January

One estimate case that was completed outside of the normal timeframe.

### February

One estimate case that was completed outside of the normal timeframe.

A transfer out calculation.

Two general cases, with one being a query over the pay that was used for an Annual Allowance calculation, and one a request for widow's figures.

### March

One estimate task that was completed outside of normal timeframes. This calculation did have additional AA calculations to perform, and this took us slightly longer.

One set of options that were completed late. There was an issue with historic AA debits that need resolving before the figures could be sent to ensure that these were accurate.

The KPI statistics for quarter 4 continue to show improvement from the earlier part of the year. This is a result of increased recruitment and training and the setting up of dedicated call handlers within the unit to allow the more experienced staff to focus on more complex work. We are hopeful of seeing sustained results in future quarters, but we will continue to monitor our performance very closely.

# 07 Complaints

Full Name	Description	Date received	Date completed	Comment
	None this period			



**Paul Mudd**  
Governance Manager  
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