



Surrey Firefighters Local Pension Board 17 January 2020

Administration Update 1 September 2019 – 31 December 2019

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 September and 31 December 2019 can be found at Annex 1.
4. As discussions are still ongoing regarding Service Level Agreements the report provides all information on cases completed, and length of time taken to complete.

5. Details of all current work in progress can be found at Annex 2.
6. This information is being provided so that progress of clearing through overdue cases can be tracked.
7. The 2019 version of the Scheme Calendar can be found at Annex 3. The Systems & Support Team are currently in the process of developing a 2020 version and would look to work on this in conjunction with SFRS.

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.

8. Bulletins 24, 25, 26 and 27 have been published since the last Board meeting.
9. Bulletin 24 provided details of the new contractor for considering medical appeals. From 1 October 2019 the new provider is Duradiamond Health Ltd
This is for information only and no action is required by the Board.
10. Also in Bulletin 24 was an article relating to claims for refunds of National Insurance contributions for FPS 2006 Special Members. **Action for the FRA to make a formal election to vary their pre 2016 contracting out certificate to backdate the start date of the certificate to 6 April 2000. HMRC are to contact FRAs to let them know what action needs to be taken.**
11. There was a reference in Bulletin 24 to the data improvement reports sent by GAD to each Chief Officer and LPB Chair. **This is for information only.**
12. If not already done so, there was an **Action in Bulletin 24 for FRAs to provide the name, address, telephone number, and e-mail address for the pensions manager or senior responsible person to the Bluelight Team for sharing with HMRC.**
13. Bulletin 25 included information on the new GAD factors for Non-Club Transfers In, and confirmed the suspension of any outstanding cases can be lifted. **The Action was for Pension Board Chairs and Scheme Managers to liaise with their pension manager to ensure that the factors had been applied with immediate effect. The Operations Manager can confirm that the factors have been implemented.**

14. There was a reference to the 2020 Valuation in Bulletin 25, and an **Action for FRAs to try and mitigate as many data issues as possible by ensuring that data held is both correct and up to date before year end.**
15. Bulletin 25 also commented on the Common and Scheme Specific Data Scores required for the 2019 Scheme Return.
16. Copies of the Data Reports have previously been shared with SFRS and it is encouraged that a Data Improvement Plan should be developed using the results of the report to inform the plan.
17. Copies of these reports can be found at Annex 4.
18. Bulletin 27 contains information regarding an update on the transitional protections remedy (Sargeant). As the Board are no doubt aware, on 18 December 2019, the Employment Tribunal made an interim order on the Firefighters' transitional protections claims.
19. The order treats claimants as satisfying the age criteria regardless of their actual age as long as they meet the other criteria, which was to have been in the scheme at 31 March 2012 and 31 March 2015.
20. A factsheet has been provided by the Home Office and this has been uploaded to the Surrey Fire internal website. Some suggested text has also been provided and this has been shared with the Pensions Helpdesk to support with any enquiries they receive.
21. **There is an Action for FRA's to identify members with relevant service, whether claimants or non-claimants so that once proposals are finalised they are in a position to act.**

Staffing

22. Andrew Marson (Head of Pensions Admin) is leaving Orbis Pensions with effect from 10 January 2020.
23. The Assistant Director of Orbis is currently sourcing a replacement for Andrew and further information will be provided in due course.
24. In the interim period, Clare Chambers (Operations Manager) and Tom Lewis (Programme Manager) will be the main points of contact for the Pensions Admin team.

Summary

25. 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 – September to December 2019 Performance

Annex 2 – Work in Progress Report

Annex 3 – Scheme Calendar 2019

Annex 4 – Common & Scheme Specific Data Reports

Annex 5 – FPS Bulletins 24, 25, 26 and 27

Annex 6 – Update on GMP, Retained Fire Project and Scheme Address Tracing