



## Surrey Firefighters Local Pension Board 5 August 2021

### Administration Update 1 March to 30 June 2021

#### 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 March to 30 June 2021, and an update of performance and current issues is set out below and in the attached Annexes.

#### **Administration Performance**

3. Details of all cases completed between 1 March to 30 June 2021 can be found at **Annex 1**.
4. During the period 1 March to 30 June 2021 a total of 20 cases were reviewed and completed/terminated. This was a combination of new work received and clearance of outstanding casework. This is a decrease from 42 cases completed in the previous period due to work being carried out on other high priority projects such as 10% pensionable allowances and refunds of scheme sanction charges.
5. There are currently 79 KPI cases still open and waiting to be processed, this is a slight increase from 76 at the end of the last period. The priority is to clear as many open cases as possible prior to the transfer to XPS. Now that work has been completed on the projects mentioned in point 6, the administration team will be focussing efforts on clearing as many transfer cases as possible prior to the

migration to the new administrator.

### **Pension Scheme Opt-Outs**

6. It was agreed in October 2018 that Officers would provide details of the number of members opting out of the pension scheme.
7. In the period 1 March to 30 June 2021 there were 5 opt outs.

### **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. There is also the addition of the XPS Bulletin surrounding the McCloud Remedy, which is an internal document shared by XPS with the schemes it administers.

8. Bulletins [44](#), [45](#) and [46](#) (**Annex 2**) have been published since the last Board meeting.
9. Actions arising from Bulletin 44 were as follows:
  - **Remedy data collection:** FRAs and scheme administrators should familiarise themselves with the data collection tools and consider any processes or additional resources that need to be put in place. – Please see XPS Bulletin at the front of Annex 2 for more information
  - **Annual Benefit Statements:** FRAs should ensure that projections for protected members do not include final salary benefits projected past 31 March 2022. – This has been implemented for this year as required
  - **IDRP data collection:** FRAs should return the completed IDRP data template by 31 May 2021.
10. Actions arising from Bulletin 45 were as follows:
  - **Remedy self-assessment survey:** FRAs to complete SAB remedy self-assessment survey by 30 June 2021. Survey link has been emailed to authorities.- This was completed through a combination of payroll, Surrey Pension Administration Service and the incoming provider, XPS

### **Pensions Helpdesk**

11. Between 1 January and 30 June 2021, the Helpdesk handled a total of 41,911 enquiries with 87.5% of these being resolved at the first point of contact. 19,720 of the enquiries were received via telephone calls and 22,191 via e-mail. Please be aware, these numbers are across all 6 schemes in which the Helpdesk provides its services for.

12. The team aim to respond to all e-mail enquiries within the corporate service level agreement of 3 working days. As at 30 June, customers 'Happiness Factor' was rated at 88%.
13. The Pensions Helpdesk have recently recruited 7 new agents and training is ongoing. Progress on training has been slower than usual due to the added complexities of carrying this out remotely.

### **Administration migration to XPS**

14. The Pension Administration continues to support the migration of the PAS to its new provider XPS. Project Management has been loaned to the Fire Service to ensure the smooth transition of the administration service, with the aim of minimising any disruption to the members.
15. The key stages of this migration are as follows:
  - a. First data extraction on 21.07.2021
  - b. Test payroll run by XPS w/c 26<sup>th</sup> July
  - c. A series of reports to be run and provided to XPS which are to be run after the data extraction but, before the payroll period ends on 22.07.2021
  - d. Collation of all administration changes that will affect the payroll to be supplied to XPS for dual payroll run in August
  - e. Live data extraction to take late August
  - f. Surrey Administration closure for Fire scheme 20<sup>th</sup> August
  - g. XPS go live 1 September 2021
16. Please see annex 3 for latest highlight report.

### **Pension Increase:**

17. Pension Increase was applied for all members, across all schemes in line with the respective payroll dates. The 1992 scheme was implemented for March 2021 payroll, with all other schemes paid within payroll period 1, April 2021.

### **Annual Benefit Statements**

18. The end of year / annual benefit statement project has progressed well. All fire data has been provided by Surrey payroll and all members ABS' will be produced by the end of July, early August, well in advance of the statutory deadline of 31 August.
19. Due to the service migration dates, Annual Allowance statements will be produced by XPS, the new administration provider.

### **Data Improvement**

20. Prior to the migration to XPS, there is work currently underway to ensure any historic data gaps are filled where possible, these include:

- a. Obtaining any missing end of year data for members between 2008 and 2014. PAS are working with the payroll service to obtain this information and interface the data into Altair pre final data cut.
- b. Interfacing missing CPD payments from 2017/18 and 2018/19. These have now been interfaced, with PI applied where necessary, on members records in Altair.

If required, data will be captured by Surrey PAS but not interfaced into Altair, should this pose a risk to the migration of the data to XPS, in line with the project plan.

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**Report contact:** Clare Chambers and Tom Lewis

**Contact details:**

T: 07779 971634 E: [clare.chambers@surreycc.gov.uk](mailto:clare.chambers@surreycc.gov.uk)

T: 07583 072853 E: [tom.lewis@surreycc.gov.uk](mailto:tom.lewis@surreycc.gov.uk)

**Sources/background papers:**

Surrey Local Pension Board Terms of Reference

**Annexes**

Annex 1 – SFRS March to June 2021 KPI Report

Annex 2 – FPS Bulletins 44, 45 and 46

Annex 3 – Migration Highlight Report