



Surrey Fire & Rescue Authority

Pension Board Report

2023/2024 – Q1

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01 Overview

Regulations and Guidance

April 2023

LGA issued Bulletin 68

Bulletin 68 covered many topics most with actions arising, see below:-

Actions arising

Consultation on the Firefighters' Pension Scheme (Remediable Service) Regulations 2023

FRA's are encouraged to respond to the consultation by the deadline of 23rd May 2023.

XPS will be providing their response.

Consultation on Retained Firefighters' Pensions: Proposed changes to the Firefighters' Pension Scheme (England) 2006

FRA's are encouraged to respond by the deadline of 9th June 2023 - XPS will be providing their response.

Commutation on retirement factors and guidance update

The factors are effective from 3 April 2023, please ensure that you are using the correct factors for any retirements following 3 April 2023 (inclusive). XPS confirm that they are using the correct factors

Secondary Contracts – Injury and Death Benefits

LGA suggest that FRA's review their contracts to ensure that a secondary contract has been awarded correctly.

Matthews Poster

LGA has been published a Matthews Poster which can be found under the Second options exercise resources on the special members of FPS 2006 page

Each FRA can personalise the poster and publicise the second options exercise at their fire authority and fire stations.

Annual Allowance - Impact of the backdated pay award

FRA's and administrators to consider the factsheet when determining their calculations for Annual Allowance where a backdated pay award has occurred.

Generic Text for Retirement and Estimates Letters

The Fire Communications Working Group has agreed template wording below for FRA's or Administrators to include within their estimate/retirement letters to cover re-employment.

FRA's and/or administrators need to consider whether to include this in their letters.

Request for contact details

FRAs are requested to remind members, in correspondence, which is sent out, to keep their administrators updated of any change in address or contact details. FRAs to include a request in correspondence to all members.

Other News

HMRC retained firefighter bulletin

We are aware that HMRC have recently sent out emails to Fire Authorities in England, Wales and Northern Ireland asking for further information in relation to National Insurance refunds for retrospective entry into the pension scheme.

Each Fire Authority scheme has received information bespoke to them.

HMRC have provided further clarity around the information they have requested which can be located in the first options exercise resource area of the Regulations and Guidance website.

May 2023

LGA issued Bulletin 69

Bulletin 69 covered many topics most with actions arising, see below:-

Actions arising

Consultation on the Firefighters' Pension Scheme (Remediable Service) Regulations 2023

FRA's and administrators should familiarise themselves with the response, ahead of the Home Office's response to the consultation

The Pension Regulator data requirements – 2023 scheme return:

FRA's and administrators to review the data scoring guidance for 2023 ahead of the scheme return.

Ill health re-assessment IQMP template referral letters available:

FRA's should send these and the relevant accompanying documentation to the IQMP using the relevant IQMP template referral letter.

Government Actuaries Department (GAD) - updated factors:

FRA's and Administrators to ensure that they are using the correct factors.

Data Conference Slides:

FRA's to view the slides and consider data more strategically now and in the future

Age Discrimination remedy – data sharing: Administrators to share pensionable data

for members who are subject to age discrimination remedy and have had an interbrigade transfer during the remedy period with the current FRA's administrator on request.

To review your privacy notice and add some additional wording, where relevant. Any amendments should be approved as per your internal processes.

Automatic enrolment – Call for evidence:

FRA's to be aware of this call for evidence.

The Public Service Pension Schemes (Rectification of Unlawful Discrimination) (Tax) (No. 2) Regulations 2023 :

Interested parties to review the consultation and establish whether you wish to respond to the consultation by 19 June 2023. Also, consider whether you wish to be part of the round table sessions.

SAB response to the Consultation on the Firefighters' Pension Schemes (Remediable Service) Regulations 2023:

FRA's and administrators should familiarise themselves with the response, ahead of the Home Office's response to the consultation.

SAB Guidance Note on Pensionable Pay Remedies:

FRA's to refer to the pensionable pay note when dealing with cases where elements of pay need retrospectively adjusting.

HMRC Remedy Newsletter:

Administrators and FRA's to consider whether you wish to volunteer to assist HMRC

June 2023

To be updated once XPS Technical Team have considered the latest bulletin

Additional Work / Previous Minutes

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

Work continues with our provider. A revised file is due to be submitted in June, as there are new data sources available which will enhance the return rate. We are also looking into mortality screening costs and will be undertaking a project to offer this service.

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 2026 following the governments restated connection confirmation.

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 early in 2023. 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 was the 15th May and following receipt of these files, we will update all active member records with contributions and pension accrual data for the 2022/ 2023 scheme and financial year.

Work continues with SFRS to ensure statutory deadlines are met, however the retrospective pay award is an ongoing issue that all parties are working to resolve.

Analysis of late tasks

Further to your request to provide analysis regarding the work completed outside of the KPI periods.

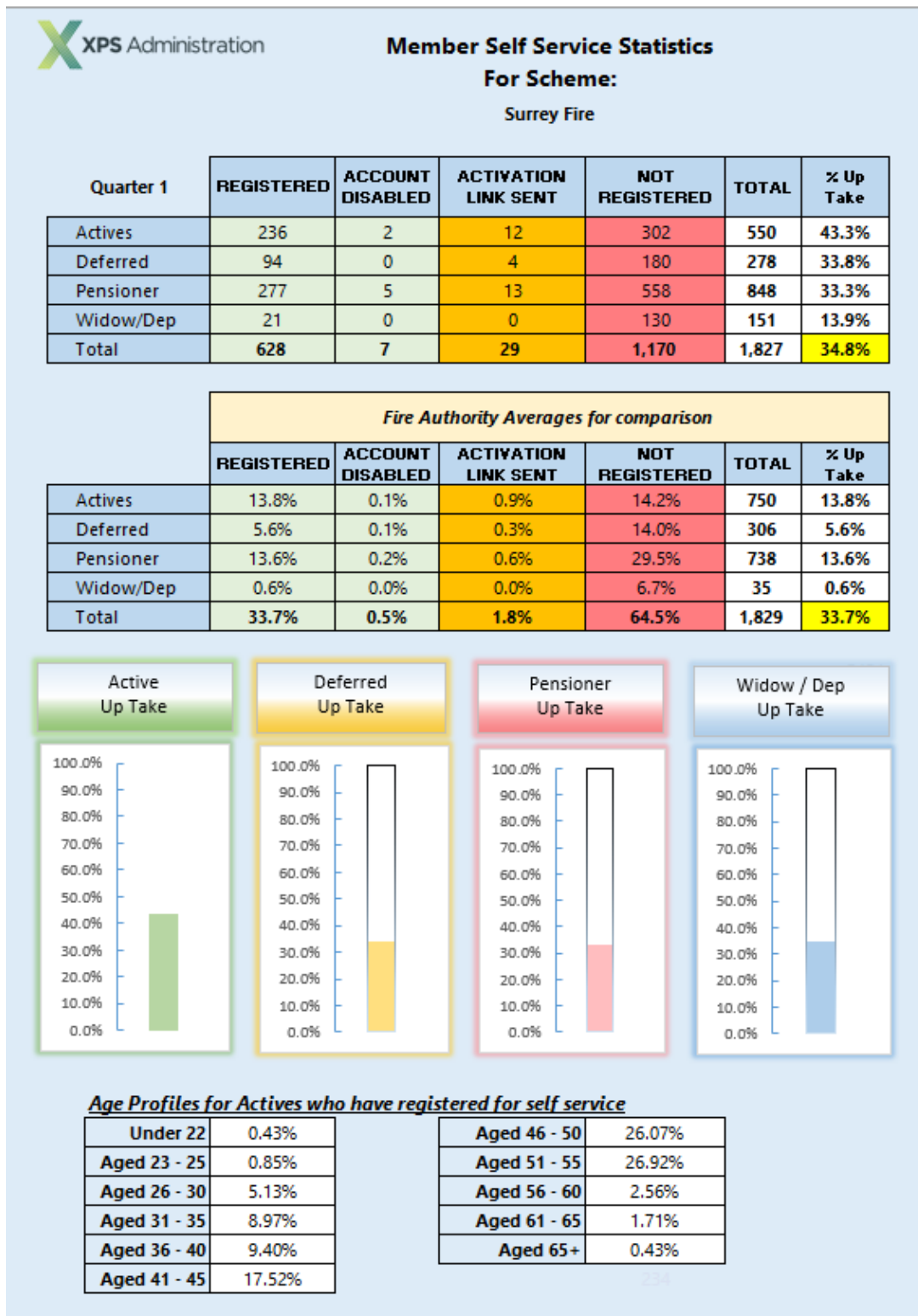
This is being looked at within the Administration team. It is expected that this will become available. We are looking at the best ways to present this information as it is something that we are keen to provide. A Verbal update in respect of the longest failure will be provided to the Board.

Pension Scams

A verbal update will be given to the Pension Board covering regulations, processes and communications considered when combating pension scams.

02 Member Self Service

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



03 Common Data

Surrey Fire				57	▼
Data Test	Common data score			Previous Quarter	
	Max Population	Total Fails	% OK	Total Fails	% OK
NINO	2278	2	99.91%	2	99.91%
Surname	2278	0	100.00%	0	100.00%
Forename / Inits	2278	0	100.00%	0	100.00%
Sex	2278	0	100.00%	0	100.00%
Title	2278	0	100.00%	0	100.00%
DoB Present	2278	0	100.00%	0	100.00%
Dob Consistent	2278	0	100.00%	0	100.00%
DJS	2278	0	100.00%	0	100.00%
Status	2278	0	100.00%	0	100.00%
Last Status Event	2278	4	99.82%	1	99.96%
Status Date	2278	17	99.25%	18	99.22%
No Address	2278	10	99.56%	11	99.52%
No Postcode	2278	17	99.25%	17	99.26%
Address (All)	2278	50	97.81%	56	97.56%
Postcode (All)	2278	56	97.54%	62	97.30%
Members with a Fail	2278	27	98.81%	25	98.91%
Members with Multiple Fails	2278	51	97.76%	57	97.51%
Total Fails	2278	78	96.58%	82	96.42%

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 1 2023 - 2024

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	0 -	68 ▼	800 ▲	139 ▼	8 -
New-NFPS	3 ▲	101 ▲	21 -	1 -	0 -
CARE - 2015	547 ▼	111 ▲	25 ▲	2 -	1 -
Total	550 ▼	280 ▲	846 ▲	142 ▼	9 -

Previous Quarter 4

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 -
Total	567 ▼	274 ▲	839 ▲	144 ▲	9 -

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

Current Year 2023/2024

Surrey Fire	Cases completed	Cases completed within target	Cases completed outside target	Cases: % within target
April	40	36	4	90%
May	46	39	7	85%
June	0	0		
Quarter 1	86	75	11	87%
July				
August				
September				
Quarter 2				
October				
November				
December				
Quarter 3				
January				
February				
March				
Quarter 4				
Year - Total	86	75	11	87%

Previous Year 2022/2023

Surrey Fire	Cases completed	Cases completed within target	Cases completed outside target	Cases: % within target
Quarter 3	111	109	2	98%
January	46	45	1	98%
February	44	40	4	91%
March	47	44	3	94%
Quarter 4	137	129	8	94%
Year - Total	567	495	72	87%

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.

April 2023

April 2023					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	0	0	0
Deferred Benefits	10	90	4	4	100
Divorce Cases	30	100	0	0	0
Estimates	10	100	1	0	0
General	10	100	21	18	86
Processing new entrants	10	90	0	0	0
Refunds	10	100	0	0	0
Retirement Actual	10	100	1	1	100
Retirement Options	10	100	2	2	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	10	10	100

May 2023

May 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	5	5	100
Divorce Cases	30	100	0	0	0
Estimates	10	100	6	3	50
General	10	100	17	13	76
Processing new entrants	10	90	1	1	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	2	2	100
Retirement Options	10	100	3	3	100
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	11	11	100

Task analysis

With reference to April and May 2023 KPI compliance is slightly lower than that reported in March 2023, but this represents only one additional case. Patterns of work continue to be the same as reported in previous months and quarters and we are looking at additional training areas. We will continue to monitor performance and raise any areas of concern if necessary.

07 Complaints

Full Name	Description	Date received	Date completed	Comment
	None this period			



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