



Surrey Fire & Rescue Authority

Pension Board Report

2023/2024 – Q4

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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

FRA's are requested to remind members, in correspondence, which is sent out, to keep their administrators updated of any change in address or contact details. FRA's 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

FRAs 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:

FRAs and administrators to review the data scoring guidance for 2023 ahead of the scheme return.

Ill health re-assessment IQMP template referral letters available:

FRAs should send these and the relevant accompanying documentation to the IQMP using the relevant IQMP template referral letter.

Government Actuaries Department (GAD) - updated factors:

FRAs and Administrators to ensure that they are using the correct factors.

Data Conference Slides:

FRAs 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:

FRAs 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:

FRAs 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:

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

HMRC Remedy Newsletter:

Administrators and FRAs to consider whether you wish to volunteer to assist HMRC

June 2023

LGA issued Bulletin 70

Bulletin 70 covered many topics, most with actions arising; see below: -

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

FRAs and administrators to familiarise themselves with the LGA's response to the consultation ahead of the Home Office's response.

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

FRAs and administrators to familiarise themselves with the LGA's response to the consultation ahead of the HMRC's response.

Data Collection for 2015 remedy:

FRAs to ensure that the data collection template is completed and sent to administrators by their set deadlines so that they are prepared to implement remedy from 1 October 2023.

Firefighters Pay Scales:

FRAs to familiarise themselves with the pay scales available ahead of the Special Members FPS 2006 (Matthews) remedy exercise to commence in October 2023.

Pay scales have been located going back to 1962. These have been added to the Firefighter Pay Scales page on the member-restricted area on the Firefighters' Regulations and Guidance website.

Home Office collection of FPS forecasts for 2023-24 to 2028-29:

FRAs should start preparing to collate the necessary information; this is similar to that provided last year.

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

FRAs and administrators to familiarise themselves with the SAB's response to the consultation ahead of the Home Office's response.

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

FRAs and administrators to familiarise themselves with the SAB's response to the consultation ahead of the HMRC's response.

Added Years Factsheet:

FRAs and Administrators to ensure they are using the updated version on their websites. LGA has updated the Added Years Factsheet to include the rate for 2023; this can be found on the factsheet page of the Firefighters Pensions Regulations and Guidance website.

Government Actuary's Department (GAD): Data Projects and Long-Term Strategy:

FRAs are advised to read GAD's write-up of the event and their broader focus on data.

Remedy readiness self-assessment tool:

Scheme managers must complete the self-assessment tool and report to their senior teams and local pensions boards.

Data Conference Q & and Pension Dashboards:

FRAs and administrators may review the Q & A's for information.

Remedy member examples by GAD:

FRAs and administrators should read these with reference to slide 15 from the coffee morning of 26 January 2023.

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

As a third-party administrator, XPS responded on 16 June 2023.

July 2023

LGA issued Bulletin 71

Bulletin 71 covered many topics most with actions arising, see below: -

Home Office collection of FPS forecasts for 2023-24 to 2028-29:

FRAs should ensure that they are using the correct CPI rates in their forecasts and ensure that they meet the submission deadline.

Age discrimination remedy – retrospective remedy:

FRA and administrators to read the response and ensure that they are working to be ready for the regulations' implementation on 1 October 2023.

Age discrimination remedy – Contributions Calculator inputs:

FRA and administrators may wish to familiarise themselves with the draft inputs, so that they can ensure they are holding all the relevant data.

Age discrimination remedy - Interest and Tax:

FRA and administrators should note this position, to ensure that they act accordingly when carrying out remedy.

Age discrimination remedy – Pension scams:

Administrators and/or FRAs to add the suggested wording to the pension webpages.

Age discrimination remedy – warm up letters:

FRAs/administrators should use these to communicate with their members ahead of October 2023.

Age discrimination remedy – Ill-Health re-assessment member outcome letters:

Once the IQMP has provided their determination and FRAs have considered this and agree with the outcome, FRAs should send these using the relevant member outcome letter.

Firefighters' Pension Scheme Adjustment in Respect of 2021 and 2022 Revaluation:

FRAs and administrators to make themselves aware of this issue and start scoping the work involved.

Government Actuary Department (GAD) – updated factors:

FRAs and administrators to ensure that they are using the revised factors from the relevant implementation dates.

Member benefit illustrations – FPS Northern Ireland:

FRAs and administrators to make their members aware of the benefit illustrators, where applicable.

Pension entitlements for retained Firefighters 2023 – FPS Wales:

FRAs and administrators to review the consultation and respond accordingly.

Abolishing the pensions lifetime allowance:

FRAs and administrators to make themselves aware of the measures involved and consider whether they wish to respond to the consultation.

Member remedy tax calculator:

Scheme managers should register on the Secure Exchange Data Service ahead of the remedy exercise and delegate access accordingly

AUGUST 2023

LGA issued Bulletin 72

Bulletin 72 covered many topics most with actions arising, see below: -

Age Discrimination Remedy – Warm up letters:

FRAs/administrators should use these to communicate with their members ahead of October 2023.

Age Discrimination Remedy – Remediable Service Statements:

Administrators are recommended to use the template covering letter, where the RSS is not yet available with existing retirement option letters offering the member a choice of legacy and reformed scheme benefits.

Age Discrimination Remedy – Remedy tax and contributions:

FRAs and administrators should familiarise themselves with the draft inputs, so that they can ensure they are holding all the relevant data.

The Pension Regulator – Scheme Return:

FRAs to ensure that their scheme return contact details are up to date.

September 2023

XPS attended the FPS Technical Working Group on 19 September 2023

XPS attended the Firefighters' Annual Conference Day two 20 September 2023

LGA issued Bulletin 73

Bulletin 73 covered many topics most with actions arising, see below: -

Firefighters' Pensions Schemes (England) (Amendment) Order 2023:

FRAs and administrators to familiarise themselves of the consultation response ahead of the Matthews second options exercise.

Disclosure requirements:

FRAs to ensure they comply with disclosure requirements by ensuring they send the appropriate letter to Sargeant and Matthews eligible members no later than 31 December 2023.

Age Discrimination Remedy – terminology:

FRAs and administrators to note that whilst there is different terminology it all relates to the same exercise. The Matthews second exercise can also be referred to as 'remedy' but relates to a different exercise.

Age Discrimination Remedy – GAD Tax and Contribution Calculator:

FRAs and administrators to familiarise themselves with the calculator and carry out testing against their data and feedback any issues to GAD and LGA.

Age Discrimination Remedy – Funding update:

FRAs to note this and ensure that they provide the relevant data when required.

Age Discrimination Remedy – Member video:

FRAs and administrators to publicise the QR code and signpost individuals to the FPS member website for information relating to remedy, in particular the member videos as part of your communications.

Concurrent Service – Interbrigade transfers:

FRAs to make employees aware of the pension implications, should an overlap of service occur when leaving and joining another FRA, even if only by a day.

Public Service Pensions (Valuations and Employer Cost Cap) Directions 2023:

FRAs and administrators should familiarise themselves with the Directions order to ensure that they are aware of the changes.

Public Service Pensions Remedy – Member calculator:

FRAs to provide a Single Point of Contact (SPOC) to the Public Service Pensions Remedy mailbox.

FRAs and administrators to familiarise themselves with the inputs that the member will need information for.

October 2023

LGA issued Bulletin 74

Bulletin 74 covered many topics most with actions arising, see below:-

Age discrimination remedy – Contingent Decisions guidance:

Scheme managers to read the guidance and mutually agree any setting of target dates with their administrator before sharing the claim process with members.

Firefighters' Pension Scheme Adjustment in Respect of 2021 and 2022 Revaluation:

This error will be required to be corrected by Scheme Managers retrospectively.

November 2023

LGA issued Bulletin 75

Bulletin 75 covered many topics with the following actions arising, see below:-

GAD calculator – FRAs:

FRAs should read the user guide and ensure that they have the most up to date version of the calculator when they update the spreadsheet at the beginning of the month to allow for the latest interest rates.

FRAs should share this information with anyone who is carrying out the Matthews second options exercise.

Matthews - Consequential loss claims:

FRAs should provide the information requested accordingly.

Matthews – Monitoring and Reporting:

FRAs to maintain robust record keeping ensuring that the data required by the Home Office and GAD is easily accessible.

Matthews - Deceased members:

FRAs to stockpile any cases which are currently not covered by the regulations until an amendment is in place.

HMRC 2022/2023 event reporting procedure for Annual Allowance and lifetime allowance (LTA):

Scheme Managers need to submit data by 31 January 2024.

December 2023

XPS attended LGA Fire Technical Working Group on 12th December 2023

LGA issued Bulletin 76

Bulletin 76 covered many topics with the following actions arising, see below:-

Matthews – Deceased members

LGA has provided template letters to cover these types of cases, which have been published on the Special members of the FPS 2006 section of the FPS regulations and guidance website.

FRAs to use the documents provided and can amend them where required.

Matthews – Supporting documents

The statements can be used to illustrate the output from the Matthews GAD calculator to provide the individual with information on their options.

FRAs are encouraged to use the Individual Statement of Details documents to send an individual with information on their options.

Age Discrimination remedy – Immediate Choice Remediable Service Statements (IC RSS)

FRA's are encouraged to discuss the timetabling of the IC RSS with their administrators and administrators are asked to commence testing the use of the IC RSS and provide feedback to the bluelightpensions@local.gov.uk inbox.

Contact Form

LGA ask for the completion of their online form, either completed on behalf of your fire authority and/or local authority or pass to anyone else who we may need their contact details.

This will be their new contact information for anything being sent out in 2024, even if they have your current details they ask you to still complete this by 20 January 2024.

January 2024

LGA issued Bulletin 77

Bulletin 77 covered many topics with the following actions arising, see below:-

The Police and Firefighters' Pensions (Remediable Service) (Amendment) regulations 2024:

Readers should note the amendment regulations and ensure that any special members who have service within the remedy period are assessed for ill health under both the legacy and reformed schemes accordingly.

Request for data:

FRA's are asked to provide Matthew's project implementation data and opt out data to bluelightpensions@local.gov.uk by 21 February 2024, using the separate data request spreadsheets.

Matthews – GAD Calculator – Second version and query log:

FRA's should:

- Read the updated user guide and query log.
- Download the new version of the calculator from the beginning of February
- Ensure that they have the most up to date version of the calculator when they update the spreadsheet at the beginning of the month to allow for the latest interest rates.
- Should share this information with anyone who is carrying out the Matthews second options exercise.

Firefighters' Pension Added Pension Compensation:

Scheme managers and administrators are recommended to read the guidance, follow the process, and use the template supporting documents to assist the process. This process should be completed by 31 March 2024.

Age Discrimination remedy – Data Sharing Agreement and guidance:

- FRA's should use the Data Sharing Agreement for cases where a firefighter was employed by a previous FRA in the remedy period.
- FRA's are also advised to follow the guidance document when obtaining the data to ensure that the data is with administrators by 31 March 2024.

Age Discrimination remedy – Remediable Service Statement (RSS) factsheet:

We would recommend that scheme managers liaise with their pensions administrator to establish what plans are in place for producing an RSS for eligible individuals.

Injury pension calculation for a retained firefighter appointed after 5 April 2006:

Administrators to review how they have calculated injury pensions for retained firefighter appointed after 5 April 2006 and consider whether a recalculation is required.

SAB Levy 2023-24 – 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 April 2023, using the form provided with the SAB 2023-34 levy letter.

HMRC Pension Input aggregation consultation: Readers are encouraged to read the consultation and provide any comments to HMRC by 26 February 2024.

HMRC Newsletter – January 2024:

HMRC have contacted all FRAs with information bespoke to them, relating to the Matthews first exercise and national insurance refunds, and have asked that you reply accordingly. Please provide complete information to HMRC by 5th April 2024, any information supplied after this date will not be progressed or chased.

Local Pension Board (LPB) Training Sessions: Readers are asked to make their LPB members aware of the training sessions and encourage them to book onto a session.

February 2024

LGA issued Bulletin 78

Bulletin 78 covered many topics with the following actions arising, see below:-

The Firefighters' Pension Scheme (England) (Amendment) Regulations 2024:

Readers should make themselves aware of the amendments.

FRAs should ensure that pension contributions are deducted from carer's leave and is included in pensionable pay when carer's leave comes into force.

Administrators should ensure that if they haven't already, that they have applied the necessary administration changes needed to correct the error that occurred in the 2021 and 2022 revaluation orders for affected members' benefits.

Age Discrimination Remedy – Informal guidance note for accounting and finance:

FRAs should note the informal guidance and ensure that they are:

- paying any corrections to pension benefits (including the applicable interest) through the pension account,
- paying any compensation amounts through the operating account, and
- keeping robust records of the recommended data separately

Age Discrimination Remedy – Ill Health reassessments:

FRAs are encouraged to signpost members who are hesitant in agreeing to the re-assessment process to the factsheet.

Age Discrimination Remedy – Remediable Service Statement member video:

Readers are encouraged to direct members to the website and video, should members have any queries relating to the RSS.

Matthews GAD Calculator cost sharing: FRAs to complete the purchase order form and return to bluelightpensions@local.gov.uk by 21 March 2024.

Matthews GAD calculator version 2 corrections: FRAs should:

- Note the issues raised with Version 2 of the GAD calculator, and if they have the relevant calculation types which are affected, should stockpile those cases that haven't yet been processed and reprocess those that have been when the updated calculator is published. •
- Ensure that they have registered access to the calculator interest update files and the associated update email notification distribution list by contacting firematthewscalculator@gad.gov.uk

Matthews – Supporting documents: FRAs are recommended to use the updated version of the Individual Statement of Details documents.

Scheme Management and Administration (SMA) Committee survey: Administrators are encouraged to complete the survey and respond by 15 March 2024

HMRC Lifetime Allowance guidance newsletter – February 2024:

Readers should note and ensure that processes are updated to reflect:

- The removal of the requirement to test against the 'permitted maximum' on the pension commencement excess lump sum.
- The Event 24 reporting requirements
- The additional information that is needed from members upon retirement relating to any RBCEs from other schemes.
- The transitional rules and the impact on retiring members.

HMRC Newsletter 156 – February 2024:

Readers are encouraged to:

- read Newsletter 156 – February 2024, paying particular attention to the section on Public Service Pensions remedy – tax treatment of interest.
- review the slides from the joint police and fire coffee afternoon/pensions chat on Thursday 29 February 2024

Local Pension Board (LPB) Training Sessions: Readers are asked to make their LPB members aware of the training sessions and encourage them to book onto a session.

March 2024

LGA issued Bulletin 79

Bulletin 79 covered many topics with the following actions arising, see below:-

Age Discrimination Remedy – GAD tax and contributions calculator:

FRAs should ensure that they are using the most up to date version of the calculator and guidance.

Age Discrimination Remedy – GAD standalone Interest Calculator:

Administrators are encouraged to use the interest calculator to ensure consistency across the sector.

Age Discrimination Remedy – Immediate Choice Remediable Service Statement (ICRSS) roll out update to timetable and member communications:

FRAs to appropriately contact the priority cohorts and inform them on the status of their RSS.

Age Discrimination Remedy – data sharing:

FRAs and administrators to familiarise themselves with the revisions made to the document.

Matthews – GAD calculator:

FRAs should ensure that they are using the most recent version of the calculator and are recommended not to make local copies of the calculator.

Matthews - Project Implementation data request:

FRAs to complete the Project Implementation data request and return to bluelightpensions@local.gov.uk by 21 April 2024

FPS annual update:

Administrators should ensure that they are using the most up to date revaluation rates.

Bluelight inbox and query form:

FRAs and administrators are requested to use the Bluelight inbox for email correspondence with the Bluelight team. FRAs and readers are also asked to complete a query form when submitting a technical query.

The Carer's Leave Regulations 2024:

FRAs are to ensure that from 6 April 2024 they are deducting pension contributions from carer's leave and should include this in pensionable pay.

Written Ministerial Statement (WMS) – Pension Dashboard connection guidance:

Scheme managers should ensure that they familiarise themselves with the connection guidance and are ready to connect by the deadline of 31 October 2025.

Security to protect against data breaches.

You may be aware of some high-profile data breaches that have been in the news recently, affecting well known professional services firms. We understand that the information leaked includes core personal member authentication information and XPS have taken steps to ensure members data we hold is not breached.

Member Authentication

XPS take the security of members information very seriously. Due to the risks of cybercrime, fraud associated

with postal and email interception, or impersonation, it is important that the processes we use are robust. That is why we have standard processes to ensure a consistent approach is adopted for all our clients. Our current policy to authenticate a member is to ask them for 4 pieces of personal information.

- Full name
- Date of Birth (partial)
- Current Address
- NI number (partial)

However, we understand that all these data items have been compromised by at least one of the data breaches. This means that the information required to pass our security checks needs to be strengthened. To do this, we will ask the member for an additional piece of information that is unique to them and was not compromised in the breaches.

We have implemented changes that will ask members for additional personal information including their system ID, or where they do not have this, dates of joining or leaving the scheme or the related employment.

Data Transfers

There is also a low risk that there will be an increase in malicious software attacks from data transfers. Our IT Cyber Protection team have issued guidance to the whole of XPS (including the admin teams) on what to do if they receive any emails or data transfers. Data transferred through the XPS Secure site or file servers is automatically scanned for threats on receipt and the checks are repeated every night.

Ongoing

XPS will continue to monitor the position. If there are new developments, and additional security checks are needed, we will update our processes and keep you informed.

FRAs may want to highlight the risks of cybercrime and identity fraud in any upcoming member communications.

PASA Accreditation

We are delighted to advise you that XPS Administration has achieved accreditation against the PASA Pensions Administration Standards.

PASA Accreditation recognises the organisations in our industry that have evidenced compliance with the PASA Standards. This accreditation recognises the high-quality pensions administration service that XPS provides its clients.

PASA Accreditation is an independent assessment of compliance with the PASA Standards. The assessment requires applicants to:

- > Submit evidence of operational compliance with the PASA Standards; and
- > Complete an on-site review by an independent assessor to validate the evidence provided for each site where services are provided from.

The Pension Regulator has stated that good administration can be demonstrated by independent accreditation. XPS Administration will be subject to an annual assertion to show we are continuing to maintain our high standards and will be independently audited every three years.



Additional Work / Previous Minutes

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

Member tracing to form part of dashboard readiness review and report.

Conditional Data Testing

Scheme Specific data testing tools have been purchased and training sessions are commencing on this new software from 25th April 2024. This training should allow XPS to identify data gaps and this will be fed into the dashboard readiness programme.

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.

MARS Estimates

XPS have been working with SFRA to prioritise estimates required to support a specific scheme. So far, it is understood that 6 estimates have been requested and produced in enhanced timescales.

02 Member Self Service

Analysis for member self service when compared to the previous quarter show a slight decrease across all membership cohorts.

To Be Added

03 Common Data

Surrey Fire						
Data Test	Common data score			Previous Quarter		
	Max Population	Total Fails	% OK	Total Fails	% OK	
NINO	1951	1	99.95%	2	99.91%	
Surname	1951	0	100.00%	0	100.00%	
Forename / Inits	1951	0	100.00%	0	100.00%	
Sex	1951	0	100.00%	0	100.00%	
Title	1951	0	100.00%	0	100.00%	
DoB Present	1951	0	100.00%	0	100.00%	
Dob Consistent	1951	0	100.00%	0	100.00%	
DJS	1951	0	100.00%	0	100.00%	
Status	1951	0	100.00%	0	100.00%	
Last Status Event	1951	5	99.74%	5	99.78%	
Status Date	1951	16	99.18%	17	99.27%	
No Address	1951	0	100.00%	9	99.61%	
No Postcode	1951	9	99.54%	18	99.23%	
Address (All)	1951	43	97.80%	56	97.85%	
Postcode (All)	1951	51	97.39%	64	97.51%	
Members with a Fail	1951	28	98.56%	30	98.71%	
Members with Multiple Fails	1951	44	97.74%	57	97.81%	
Total Fails	1951	72	96.31%	87	96.52%	

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 102 and the youngest 10.

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 2023-2024

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	1 ▲	68 -	797 -	147 ▲	7 -
New-NFPS	2 ▼	101 -	24 ▲	2 ▲	0 -
CARE - 2015	613 ▲	119 ▲	32 ▲	2 -	1 -
Total	616 ▲	288 ▲	853 ▲	151 ▲	8 -

Quarter 3 2023-2024

Scheme	Actives	Deferred	Pensioner	Widow	Dependant
Old-FPS	0 -	68 -	797 ▲	146 ▲	7 -
New-NFPS	4 -	101 ▼	23 -	1 -	0 -
CARE - 2015	592 ▼	115 ▼	28 -	2 -	1 -
Total	596 ▼	284 ▼	848 ▲	149 ▲	8 -

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	73	64	9	88%
Quarter 1	159	139	20	87%
July	88	86	2	98%
August	33	23	10	70%
September	36	27	9	75%
Quarter 2	157	136	21	87%
October	20	15	5	75%
November	6	5	1	83%
December	8	6	2	75%
Quarter 3	34	26	8	76%
January	25	15	10	60%
February	36	13	23	36%
March	41	29	12	71%
Quarter 4	102	57	45	56%
Year - Total	452	358	94	79%

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

January 2024					
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	0	0	0
Divorce Cases	30	100	0	0	0
Estimates	10	100	2	0	0
General	10	100	15	9	60
Processing new entrants	10	90	2	2	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	3	3	100
Retirement Options	10	100	1	0	0
Transfers – in (Calculation)	10	90	1	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	1	1	100

February 2024					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	2	1	50
Deferred Benefits	10	90	4	2	50
Divorce Cases	30	100	0	0	0
Estimates	10	100	1	0	0
General	10	100	27	8	30
Processing new entrants	10	90	1	1	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	0	0	0
Retirement Options	10	100	0	0	0
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	1	1	100

March 2024					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	1	0	0
Death of a pensioner	5	100	1	0	0
Deferred Benefits	10	90	0	0	0
Divorce Cases	30	100	1	1	100
Estimates	10	100	1	0	0
General	10	100	9	1	11
Processing new entrants	10	90	22	22	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	1	1	100
Retirement Options	10	100	3	2	67
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	2	2	100

Task analysis - Fails

To be completed prior to Pension Board Meeting

07 Complaints

XPS has received a high level of contact from members in the post Remedy period particularly around the time it has taken for them to receive retirement options forms and estimates of benefits.

Our latest Position Statement goes into more detail about the challenges we have faced since 1 October (particularly with the loss of automation and the manual nature of our retirement calculations since that time). The Position statement also summarises the steps we have taken and are currently implementing to rectify the delays in the service that we have been providing.

XPS have recently deployed our own automated calculation tool within the administration team which is reducing the processing time for retirement estimates etc.

Further resources are being introduced to the administration team to help return our service to pre-1 October levels - offers have been accepted for these additional positions and they will all start with XPS shortly.


Where a member has contacted us with any concerns, we have attempted to explain the delays, apologise for them and to resolve the member's case as quickly as possible.

We will continue to monitor these and address any concerns alongside yourselves, and we appreciate your support throughout this period whilst we embed these changes.

There have been two complaints received within the latest quarter:

1: Contingent Decisions - Member wishes to complain about the time taken to respond to a CD case re Added Years.

2: Member received information late in respect of a forthcoming retirement, pushing back the earliest date that the commutation lump sum could be paid.



Paul Mudd
Governance Manager
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