



# Surrey Fire

Performance Delivery Report  
Quarter ending 30 September 2024

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Items requiring a decision or attention are marked in the report with this logo

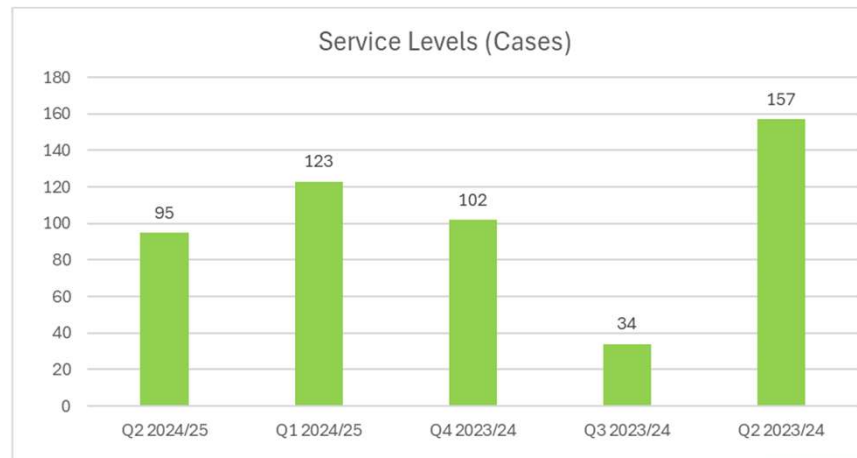
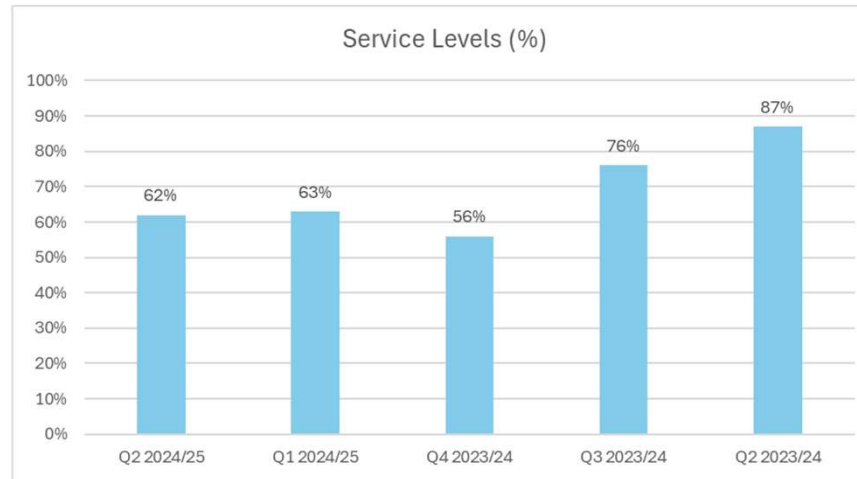


# Highlights

Membership numbers



Service levels



# Headlines

## Members

- Metrics and items to note
  - Overall membership has been relatively static the past couple of quarters

## Scheme and Legislative

- Scheme specific items
  - XPS continue to undertake weekly ABS-RSS process runs and will email members once their statement is ready.
  - XPS have contacted all members at Station Manager and above to inform them we are processing PSS's and will confirm if they have breached or not when calculations are complete
  - Both statements require relevant data (year end, McCloud, and GAD contributions) to be produced

## Performance

- This quarter has seen a slight reduction in overall SLA score



## Key items

- SLA: 62%
- Total membership is 1,936 members

# McCloud – BAU Lump Sum Payments



## Lump Sum payments made compared to Date of Retirement

	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24
<b>On DoR</b>	-	-	33.33%	-	0.00%	0.00%	-	0.00%	-	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>&lt; 7 days</b>	-	-	33.33%	-	-	0.00%	-	33.33%	-	0.00%	100.00%	60.00%	100.00%	25.00%	0.00%
<b>7+ Days</b>	-	-	33.33%	-	100.00%	100.00%	-	66.67%	-	100.00%	0.00%	40.00%	0.00%	75.00%	0.00%
<b>Cases</b>	0	0	3	0	1	1	0	3	0	2	2	5	2	4	0

## All XPS Fire and Police clients

	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24
<b>On DoR</b>	52.48%	46.11%	26.47%	40.31%	36.36%	36.61%	37.95%	27.18%	26.86%	34.83%	48.00%	57.51%	63.68%	63.32%	77.60%
<b>&lt; 7 days</b>	30.69%	32.34%	25.63%	27.04%	32.09%	33.93%	35.54%	32.31%	32.23%	28.09%	27.00%	21.46%	20.53%	25.61%	18.58%
<b>7+ Days</b>	16.83%	21.56%	47.90%	32.65%	31.55%	29.46%	26.51%	40.51%	40.91%	37.08%	25.00%	21.03%	15.79%	11.07%	3.83%
<b>Cases</b>	202	167	238	196	187	224	166	195	242	178	200	233	190	289	183

# McCloud – ABS-RSS Issuance



ABS's Issued at 31<sup>st</sup> August 2024

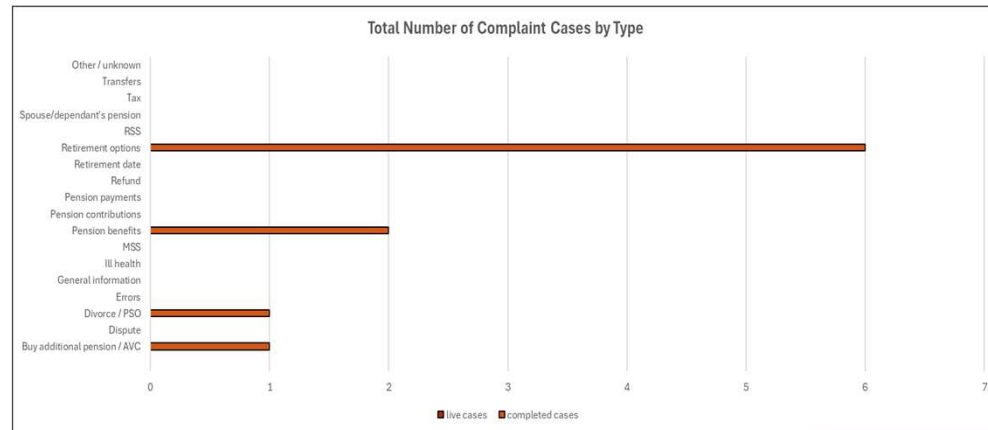
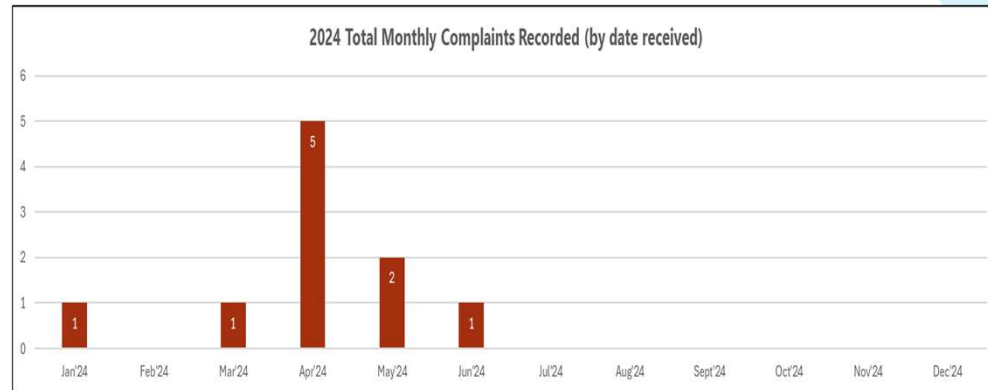
Total ABS's Due				Expected RSS/Roll Back					Expected Pst 2012 members)			Expected CARE only			
Client	Due	Produce	%	TOTA	Produce	%	RSS Produce	RSS %	Roll-Back Produce	TOTA	ABS Produce	%	Total	ABS Produce	%
Surrey Fire	607	0	0.00%	0	0	0.00%	0	0.00%	0	279	0	0.00%	328	0	0.00%

# Errors and complaints



Complaint type	Live cases	Completed cases	Total
Buy additional pension/AVC	0	1	1
Dispute	0	0	0
Divorce/PSO	0	1	1
Errors	0	0	0
General information	0	0	0
Ill Health	0	0	0
MSS	0	0	0
Pension benefits	0	2	2
Pension contributions	0	0	0
Pension payments	0	0	0
Refund	0	0	0
Retirement date	0	0	0
Retirement options	0	6	6
RSS	0	0	0
Spouse/dependant's pension	0	0	0
Tax	0	0	0
Transfers	0	0	0
Other/unknown	0	0	0
<b>Total</b>	<b>0</b>	<b>10</b>	<b>10</b>

IDRP Description	Date received	Date completed	Comment



# Member engagement – myownpension

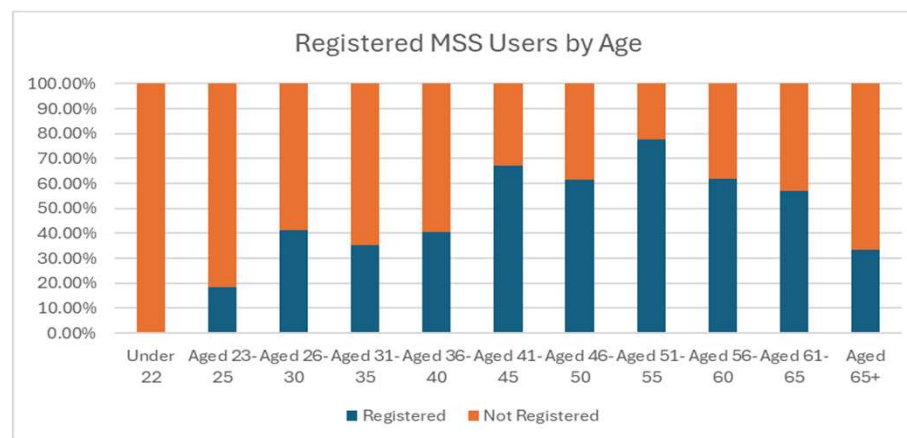


The tables below provides information on the number of Cleveland Fire members who have registered for the online member self-service portal. There is also then a table to put your member take up into context with the average across the Fire schemes which we administer as well as an age profile.

Q2 2023/2024	Registered	Not Registered	Total	%age uptake
Actives	254	281	535	52.52%
Deferred	156	100	256	39.06%
Pensioners	533	298	831	35.86%
Widows/Dependants	137	20	157	12.74%
<b>Total</b>	<b>1,080</b>	<b>699</b>	<b>1,779</b>	<b>39.29%</b>

All Blue Light	Not Registered	Registered	Total	% Uptake
Active	30,792	48,025	78,817	60.93%
Deferred	15,205	8,251	23,456	35.18%
Pensioner	55,561	33,564	89,125	37.66%
Widow/Dep	14,353	965	15,318	6.30%
	<b>115,911</b>	<b>90,805</b>	<b>206,716</b>	<b>43.93%</b>

Age Group	Not Registered	Registered
Under 22	100.00%	0.00%
Aged 23-25	81.48%	18.52%
Aged 26-30	58.73%	41.27%
Aged 31-35	64.56%	35.44%
Aged 36-40	59.42%	40.58%
Aged 41-45	32.89%	67.11%
Aged 46-50	38.38%	61.62%
Aged 51-55	22.37%	77.63%
Aged 56-60	37.93%	62.07%
Aged 61-65	42.86%	57.14%
Aged 65+	66.67%	33.33%





# Membership

Membership	Period Ending 30/09/2024	Period Ending 30/06/2024	Period Ending 31/03/2024	Period Ending 31/12/2023
<b>Active Members</b>				
Total at period start	608	616	609	616
New Starters	0	0	20	4
New Leavers	2	5	9	9
Retirements	6	3	4	2
Death	0	0	0	0
Total at period End	600	608	616	609
<b>Deferred Members</b>				
Total at period start	304	303	296	293
New Deferred	2	2	7	3
New Leavers	0	0	0	0
Retirements	1	1	0	0
Death	0	0	0	0
Total at period End	305	304	303	296
<b>Pensioner Members</b>				
Total at period start	1,018	1,013	1,007	1,002
New Retirements	17	8	8	7
New Dependents	3	0	0	3
Notified (need further details)	3	1	0	0
Death/cessation	4	2	2	5
Total at period End	1,031	1,018	1,013	1,007
<b>Total membership at period end</b>	<b>1,936</b>	<b>1,930</b>	<b>1,932</b>	<b>1,912</b>

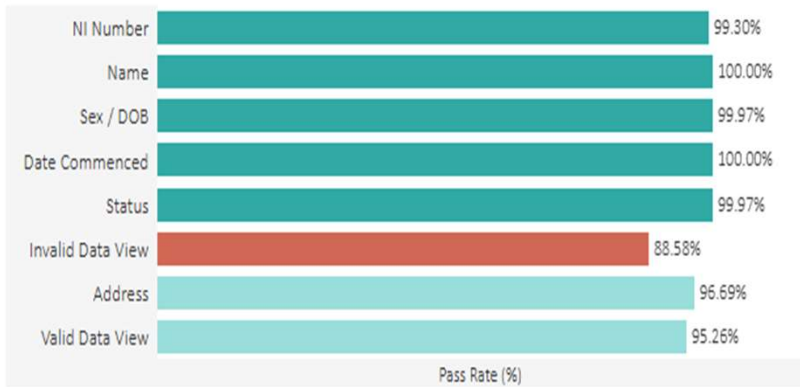


# Data Quality

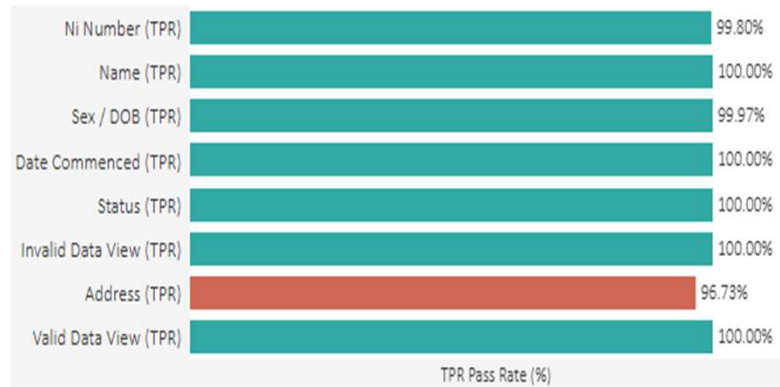
## Common Data

Member records	Members tested	Members Failed	Pass Rate
3,011	2,519	492	97.6%

Pass Rate % by Test Category



TPR Pass Rate % by Test Category



# Data Quality

## Scheme Specific Data - Fire Scheme Specific Data Quality | Overall Summary

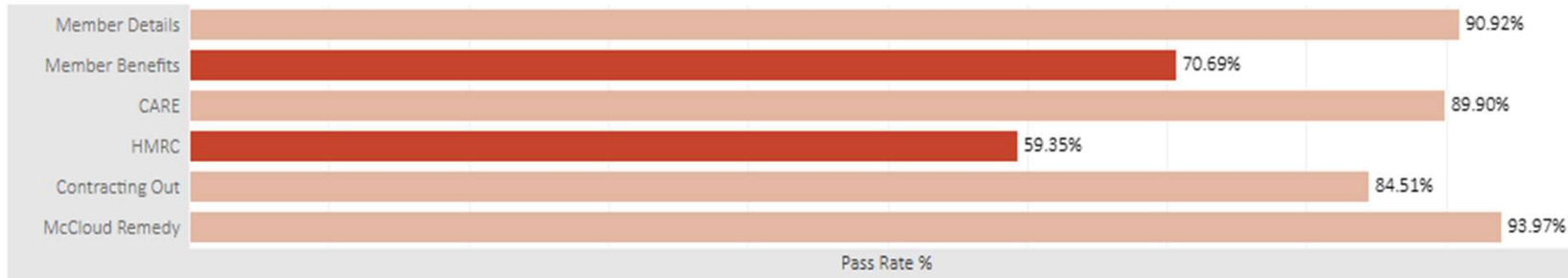


Member records	Members tested	Members Failed	Pass Rate
3,847	2,373	1,474	62.98%

### Grand Total | Pass Rate %



### Grand Total | Pass Rate % by Test Category



# Regulations and Guidance



## **JULY 2024**

### **LGA issued Bulletin 83**

Bulletin 83 covered many topics with the following actions arising, see below:-

#### **FRA' actions:**

- To liaise with their administrators on the production of ABS and ABS/RSS statements.
- Contingent Decisions, to ensure that they have read the updated guidance and are signposting members to the revised member guidance and to communicate with any individuals who are affected by this change in position.
- Matthews GAD calculator - to review the GAD update, collect, and format this information, ensuring the most up to date version of the calculator is being used.
- Matthews – to be aware of the coding requirements needed for accounting/valuation purposes for the Home Office and GAD.
- Matthews – to familiarise themselves with the statutory deadlines, to ensure that where possible they are adhered to

Further information and updates can be found in all bulletins, FRA's are advised to read the bulletins as they may also include actions for Finance Teams and Local Pension Boards

## **AUGUST 2024**

### **LGA issued Bulletin 84**

Bulletin 84 covered many topics with the following actions arising, see below:-

#### **FRA Actions**

- Firefighters Pension Scheme Valuation 2024 - GAD data request, to ensure high quality, timely data is shared with the administrator.
- Age Discrimination Remedy – to familiarise themselves with the ABS-RSS statutory deadlines.
- Age Discrimination Remedy – Treasury Directions (tax relief on contributions for active members) inform the LGA should they have any objections to the recommendations set out in the scheme manager paper.
- Firefighters' Pensions: DELTA returns – collection of data to ensure that they have prepared the information, the deadline for submission of both requests is 17:00 on Wednesday 18 September 2024

# Regulations and Guidance

## SEPTEMBER 2024

### LGA issued Bulletin 85

Bulletin 85 covered many topics with the following actions arising, see below:-

#### FRA Actions

- Firefighters' Pensions - McCloud compensation arrangement claims for Q2 FY24/25, to prepare themselves to submit their compensation data by 31 October 2024
- Matthews – Project implementation data request: to complete and return the template.
- Local Pension Board – Knowledge and Understanding: are asked to make their LPB members aware of the new content of the training section of the FPS Board website.
- Pensions Dashboards: should familiarise themselves with the guidance and to their duties.
- Local Pension Dashboard Training: are asked to make their LPB members aware of the training sessions and encourage them to book onto a session



# Appendix 1 - Service Level Reports



The table below shows our performance against the Service Level Agreement during the reporting period.

Membership	Cases completed	Cases completed within target	Cases completed outside target	%age within target
October	20	15	5	75%
November	6	5	1	83%
December	8	6	2	75%
<b>Quarter 3 2023/24</b>	<b>34</b>	<b>26</b>	<b>8</b>	<b>76%</b>
January	25	15	10	60%
February	36	13	23	36%
March	41	29	12	71%
<b>Quarter 4 2023/24</b>	<b>102</b>	<b>57</b>	<b>45</b>	<b>56%</b>
<b>Year - Total</b>	<b>452</b>	<b>358</b>	<b>94</b>	<b>79%</b>
April	64	48	16	75%
May	31	12	19	39%
June	28	17	11	61%
<b>Quarter 1 2024/25</b>	<b>123</b>	<b>77</b>	<b>46</b>	<b>63%</b>
July	36	23	13	64%
August	30	17	13	57%
September	29	19	10	66%
<b>Quarter 2 2024/25</b>	<b>95</b>	<b>59</b>	<b>36</b>	<b>62%</b>

# Appendix 1 - Service Level Reports

## Completed cases per month

Q2			Jul-24			Aug-24			Sep-24		
Service	Days	Minimum Target	Cases	Within target	%age	Cases	Within target	%age	Cases	Within target	%age
Death in Service	5	95%	-	-	-	-	-	-	-	-	-
Death of pensioner	5	95%	-	-	-	3	2	66.67	3	3	100
Deferred Benefits	10	95%	3	0	0	7	0	0	1	0	0
Divorce case	30	95%	-	-	-	-	-	-	2	0	0
Estimates	10	95%	5	2	40	3	1	33.33	4	1	25
General	10	100%	14	9	64.29	10	7	70	6	5	83.33
New entrants	10	95%	-	-	-	1	1	100	-	-	-
Refunds	10	95%	-	-	-	-	-	-	-	-	-
Retirements – actual	5	95%	5	5	100	1	1	100	3	3	100
Retirement options	10	95%	2	1	50	2	2	100	5	4	80
TV-in calc	10	95%	-	-	-	1	1	100	-	-	-
TV-in payment rec'd	10	90%	-	-	-	-	-	-	-	-	-
TV-out calc	10	95%	-	-	-	-	-	-	1	0	0
TV-out payment	10	95%	-	-	-	-	-	-	-	-	-
Variations	10	95%	7	6	85.71	2	2	100	4	3	75



# Appendix 2 – Administration Team

## Key contacts

Sharon Stoker	Client Relationship Manager	<a href="mailto:Sharon.Stoker@xpsgroup.com">Sharon.Stoker@xpsgroup.com</a> 01642 030669
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## Other contacts

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# Award-winning

## Pensions advisory



## Investment consulting



## Administration



## Technology



## Culture and Sustainability



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