



Surrey Fire & Rescue Authority

Pension Board Report

2021-2022 – Q4

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01 Overview

Regulations and Guidance

January 2022

- Firefighters Pension Scheme Bulletin 53 released

February 2022

- LGA issued a McCloud 'fact checker'. Following concerns that there were a lot of myths circulating about remedy. LGA commissioned Barnett Waddingham to work in collaboration with the Scheme Advisory Board, the Board secretariat, and the Scheme Management & Administration committee with the aim to publish a Remedy 'fact checker'. This was emailed to FRAs on 09/02/2022 and FRAs were asked to distribute document as widely as possible.
- Firefighters Pension Scheme Bulletin 54 released

March 2022

- LGA issued confirmation that following a review of the retained firefighters 'Special Options' exercise an agreement had been reached which would extend the rights of retained firefighters to access the firefighter Pension Scheme. LGA have confirmed that the Home Office are currently drafting regulations to allow the extension of the options exercise and will issue further details as it becomes available. Please note that the time period to draft / consult / and lay regulations is 18 months.
- Firefighters Pension Scheme Bulletin 55 released

Additional Work / Previous Minutes

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

XPS are working with a 3rd party and have provided Surrey FRA a quote to complete this work. This includes a tiered offering which will provide for Mortality screening as well as address screening.

Update on clearing of outstanding inherited tasks following transfer to XPS

Ongoing – you will see from the KPI metrics that some of these outstanding items that have been completed have fallen outside of the KPI. Unfortunately, this does have the effect of reducing the perceived effectiveness of the service.

Suggestions to improve the self-service portal and helpline backlog

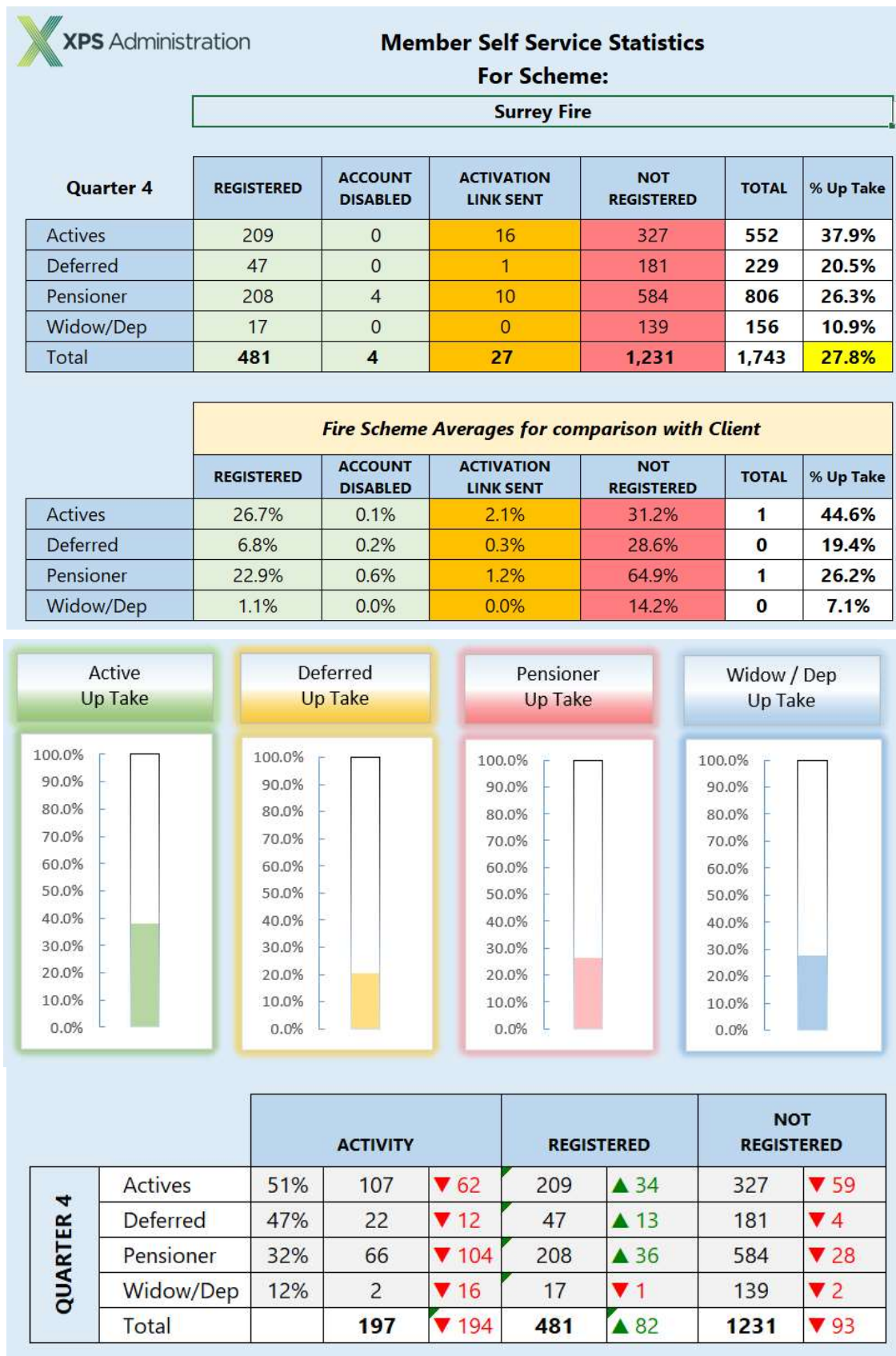
Helpline

Calls, abandonment rates, call waiting times are monitored and these have been very positive generally. Discussions however do continue regarding a move of any incoming calls, and potentially enquiries, to an XPS Contact Centre. This operation is already live within our Middlesbrough office, serving a number of non-public-sector clients.

Self Service Portal

A video has been sent to Surrey FRA to be distributed to scheme members and hopefully, this will get people to the correct areas of the website and help them sign up. We have also added to our reporting tools for Member Self Service to see if we can identify trends in respect of failing sign ups, non-signed up cohorts.

02 Member Self Service



03 Common Data

Surrey Fire			
Data Test	Common data score		
	Max Population	Total Fails	% OK
NINO	2234	2	99.91%
Surname	2234	0	100.00%
Forename / Inits	2234	0	100.00%
Sex	2234	0	100.00%
Title	2234	3	99.87%
DoB Present	2234	0	100.00%
Dob Consistent	2234	0	100.00%
DJS	2234	0	100.00%
Status	2234	0	100.00%
Last Status Event	2234	1	99.96%
No Address	2234	3	99.87%
No Postcode	2234	9	99.60%
Address (All)	2234	40	98.21%
Postcode (All)	2234	46	97.94%
Members with a Fail	2234	33	98.52%
Members with Multiple Fails	2234	40	98.21%
Total Fails	2234	73	96.73%

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 100 and the youngest 8.

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

Quarter 4 2021 - 2022

Scheme	Actives		Deferred		Pensioner		Widow		Dependant	
Old - FPS	19	▼	72	-	770	▲	144	▲	8	▼
New - NFPS	8	▼	93	▲	18	▲	0	-	0	-
CARE - 2015	540	▼	60	▲	4	-	3	-	1	-
Total	567	▼	225	▲	792	▲	147	▲	9	▼

Quarter 3 2021 - 2022

Scheme	Actives		Deferred		Pensioner		Widow		Dependant	
Old - FPS	22	▼	72	▼	768	▲	143	▼	11	-
New - NFPS	9	▼	92	▼	17	▲	0	-	0	-
CARE - 2015	549	▲	55	▼	4	▲	3	▲	1	-
Total	580	▲	219	▼	789	▲	146	▼	12	-

Quarter 2 2021 - 2022

Scheme	Actives		Deferred		Pensioner		Widow		Dependant	
Old - FPS	26	▲	80	▲	763	▲	145	▲	11	▲
New - NFPS	12	▲	138	▲	16	▲	0	-	0	-
CARE - 2015	538	▲	122	▲	3	▲	2	▲	1	▲
Total	576	▲	340	▲	782	▲	147	▲	12	▲

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.

05 Completed Cases Overview

Surrey Fire	Cases completed	Cases completed within target	Cases completed outside target	Cases: % within target
July				
August				
September	20	19	1	95%
Quarter 2	20	19	1	95%
October	29	26	3	90%
November	56	45	11	80%
December	73	71	2	97%
Quarter 3	158	142	16	90%
January	62	59	3	95%
February	56	49	7	88%
March	82	63	19	77%
Quarter 4	200	171	29	86%
Year - Total	378	332	46	88%

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.

January 2022

January 2022				Surrey Fire	
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	2	2	100
Deferred Benefits	10	90	6	4	67
Divorce Cases	30	100	2	2	100
Estimates	10	100	1	1	100
General	10	100	12	12	100
Processing new entrants	10	90	24	24	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	2	2	100
Retirement Options	10	100	2	2	100
Transfers – in (Calculation)	10	90	0	0	0
Transfers – in (Payment received)	10	90	3	2	67
Transfers – Out (Calculation)	10	100	1	1	100
Transfers – Out (Payment)	10	100	0	0	0
Variations	10	90	7	7	100

Total cases outside of the standard timeframe were three. These were:

- a deferred case where the member left in 2018 and the record had never been closed down. As it was an historic case, we did finalise but really the record should have been deferred when received.
- a deferred case, the member retired and their pension due from the 1992 scheme was processed on time, but the deferring of their 2015 record did take longer unfortunately.
- a transfer in case but again historic. It has been ongoing since we took over with the transferring company having issues with the bank details to make payment. This is now resolved, and the transfer finalised, however the member actually left the service in August 2021, but no paperwork has yet been received to confirm this. We have requested this again to be able to process his inter-brigade transfer out.

February 2022

February 2022				Surrey Fire	
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	2	2	100
Deferred Benefits	10	90	2	2	100
Divorce Cases	30	100	0	0	0
Estimates	10	100	7	6	86
General	10	100	24	18	75
Processing new entrants	10	90	0	0	0
Refunds	10	100	1	1	100
Retirement Actual	10	100	3	3	100
Retirement Options	10	100	5	5	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	12	12	100

Total cases outside of the standard timeframe were seven. These were:

- an estimate case but also a complaint case the member raised regarding the transfers of previous service from before XPS took over. Two previous periods of service were not recorded on our records and member stated that no ABS had been issued. We had to update the record and issue an estimate in place of an ABS, which did unfortunately take time.
- an ill health estimate, and we took longer to respond to advise this request needed to come from Surrey.
- A request for details of all service held and how pension benefits would be calculated due to the member querying the accuracy of the figures on their 2019 ABS. They also made a SAR. There were delays in getting details of the team at Surrey who deal with SAR requests.
- Member contacted us to advise they had been promoted in September 2021. We held no details of this so had to contact Surrey for confirmation. There was a delay in updating the member's record once this had been received.
- Member requested confirmation of their pension amount. The letter to confirm this did take longer than our normal timeframe.
- Member advised that their marital status was incorrect. We updated their record, but this did take several days longer than usual.
- general task that was closed in error as it was actually an inter-brigade transfer.

March 2022


March 2022				Surrey Fire	
Service	Days	Minimum Target	Cases	Within Target	Actual Performance
Death in Service	5	100	0	0	0
Death of a pensioner	5	100	3	3	100
Deferred Benefits	10	90	4	3	75
Divorce Cases	30	100	1	1	100
Estimates	10	100	12	4	33
General	10	100	27	17	63
Processing new entrants	10	90	2	2	100
Refunds	10	100	0	0	0
Retirement Actual	10	100	10	10	100
Retirement Options	10	100	13	13	100
Transfers – in (Calculation)	10	90	2	2	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	8	8	100

Total cases outside of the timeframe were nineteen. These were:

- This was a deferred case, the member retired and their pension due on the 1992 scheme was processed on time, but the deferring of their 2015 record did take longer unfortunately.
- Estimate request as did not agree figures MSS was producing compared to those quoted by Surrey. The pay recorded on our record was incorrect and needed updating. The estimate took longer to produce than our normal timeframes.
- Estimate request. No CARE pay held, and previous pay figures did not match year end posting held. The estimate took longer to produce than our normal timeframes.
- Estimate request x 2 that did unfortunately take longer to produce
- Estimate request that did unfortunately take longer to produce
- Estimate request that did unfortunately take longer to produce timeframes.
- Estimate request x 2 that did unfortunately take longer to produce
- Remedy query could not provide information.
- ID query.
- Query from outstanding work list transferred to us. This related to ex-spouse's record so case closed.
- General x 2 as member queried pay held on record. This was updated once received
- Needed correct address to forward cheque to Surrey in relation to a death case.
- Incorrect task as dealt with under retirement process and no delays.
- General query over retirement age.
- General task closed in error when it had been dealt with under a transfer task.
- General task where member needed explanation of how their historic transfer credit was calculated.

07 Complaints

Full Name	Description	Date received	Date completed	Comment
	None this period			



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