

Pensions Team Newsletter

September 2022



HELLO!

Welcome to the monthly Pensions Team Newsletter



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Bulletin Breakdown!

LGA Bulletin Updates

DWP confirms frozen refunds are out of scope for initial Pensions dashboards

On 3 August 2022, the Department for Work and Pensions (DWP) confirmed that frozen refunds will be out of scope for initial dashboards because they are not considered to be member benefits.

The LGA remain committed to updating the DWP about any issues this creates for the LGPS when we first start receiving find requests.

Guidance on Value Data for pensions dashboards

The Pensions Administration Standards Association (PASA) has published [Guidance on Value Data for pensions dashboards](#). PASA recognises that the regulations are yet to be finalised and that some uncertainty remains. The guidance includes a checklist of steps administrators can take now, despite these uncertainties. These steps will help administrators to:

- gain an understanding of what the Value Data requirements mean for their scheme
- identify where gaps exist, what the options are for filling those gaps and whether they should wait to see DWP's final regulations before making a decision
- decide if there is work they can do in advance of the designated staging date.

As reported in [Bulletin 227](#), public service pension schemes will have to provide Value Data to pensions dashboards by 1 April 2025, although they can supply it earlier if they choose to.

You can read more about the launch in the [PASA press release – Value Data guidance](#).

HMT consultation on public sector exit payments

On 8 August 2022, HM Treasury (HMT) launched [a consultation on public sector exit payments](#). The Government is proposing to introduce:

- an expanded approval process for employee exits and special severance payments
- additional reporting requirements.

The guidance is intended to apply to all bodies that are classified as 'Central Government'. This does not include local authorities or bodies under devolved administrations. The guidance will apply to academies.

You can find more information about the proposals in the [draft HMT guidance on public sector exits](#).

[You can read the full Bulletin \(228\) here.](#)

What's New?

Responsible Investment Policy Consultation Live

Investment Team

The Fund's new Responsible Investment (RI) Policy was approved at the Pension Fund Committee meeting in June 2022, subject to consultation with members, employers, and the public.

We are now running the consultation which is planned to run for 8 weeks from 12 September.

It is being run by the independent BIA Research team, who are within Surrey County Council, the Fund's Administering Authority. This allows the Fund to utilise the full resources and expertise available while maintaining standard processes.

The consultation comprises a number of questions that cover; the Fund's commitment to the UN's Sustainable Development Goals, the Fund's core RI beliefs, the corporate engagement approach and escalation policy and the Fund's openness to collaboration regarding engagement.

You should have received an email with a link asking you to complete our survey and we would encourage you to take part and have your say.

Please let us know if you have not received your invitation to complete the survey.

The results will be collated and reviewed by officers, the Pension Fund Committee, and consultants to determine if changes to this, or future policy, are required.

If you would like to view it, a copy of the [draft RI policy can be found here](#). The general public survey can be found at: [Surrey Pension Fund Responsible Investment Policy - Surrey County Council - Citizen Space](#)

Pay Your Pension Some Attention!

Communication & Education Team

The PLSA's 'Pay Your Pension Some Attention' campaign has now gone live.


The campaign is designed to get everyone more aware of their pension and asking questions. Check out their website at www.pensionattention.co.uk

The campaign launches with Big Zuu's music video, encouraging people to give their pension some attention.


Select the image to give it a listen!



What's New?




BE MORE PRODUCTIVE WORKING FROM HOME




1. Use a Calendar

Plan your tasks ahead on a calendar so you can prepare for a productive day.




2. Set a Timer

Work in bursts of 30-45 minutes and set a timer to stop and take a break. You'll be more productive!




3. Write in a Journal

Get off the computer and use a note-book to write down (or draw) your ideas & goals.




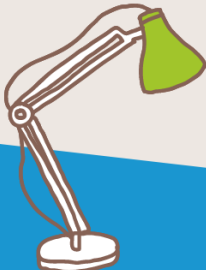
4. Power Hour

Get up early for a "power hour" to start work - while the house is quiet!



5. Prepare Your Space

Create a calm, fun environment for creativity with good lighting and a comfortable workspace.



CELEBRATING YOUR SUCCESS

Congratulations to Tim McCann on successfully completing the CIPP Certificate in Pensions Administration course.

Tim has worked hard over the last year to learn various aspects of pensions administration, to complete several assignments and a final exam on his way to passing the course.

Well done on a great achievement Tim!

Dean Brackstone

Our warmest congratulations and best wishes to Ellie Calvert on passing the CIPP Certificate in Pensions Administration course.

Not only has she been a great student completing this successfully and learning about the broader pensions industry, but she has also inspired other colleagues across the team to enrol on the upcoming course.

Fiona Jackson



Congratulations to the future benefits team we are on course this month for our first overall KPI % of over 90%, currently 92.1%, which is a fantastic achievement by all the team.

David Hodgson

FOND GOODBYES

Priya Iyer

I'm sure you'll join us in wishing Priya all the best for her future endeavors

Warm Welcomes



Jennie Stevenson

Pensions Training Support Officer

Hi! I'm Jennie Stevenson and I joined Surrey at the beginning of September. I've lived in Surrey for the past 30 years, but I grew up in west London. I enjoy gardening, baking and various crafty activities.

Since joining the Pensions team, I've been struck by how everyone is so friendly and helpful. I'm excited to be here and to see what the future holds at SCC.

Experience: Working in Pensions is a bit of a departure for me, as I've spent the last fourteen and a half years as a primary school teacher, mainly working with children aged between 5 and 10 years old. Prior to that, I worked in management accounting for London Electricity, which later became EDF.

When I had the opportunity to take voluntary redundancy from that role, I became self-employed for a period of two years, working as a registered childminder, as my own two daughters were young at the time.

After that, I returned to studying, to train as a teacher. Now, I've moved on to seek a new challenge and to learn something new, whilst still applying my teaching skills.

Skills: I'm on a steep learning curve, getting to grips with the complexities of pensions, and the LGPS in particular, but over the coming months (and years!), I will be reviewing and developing the training we have in the Surrey Pension Team, with a view to helping us all to deliver the first class customer experience mentioned in our mission statement.

I'm hoping that my ability to listen to people's ideas and to communicate learning in a way that people understand will transfer well to my new role. Hopefully, if I can handle a class of 34 lively ten-year-olds, a small group of adults learning job-related skills will be a breeze!

Interesting fact: When I was six years old, my teacher showed my mum a piece of writing I'd done about what I wanted to be when I grew up. I'd written that I wanted to be a baker, but that if I couldn't do that, I'd be a teacher instead.

Well, I had a Saturday job in a baker's shop as a teenager, and then ticked off the second ambition to become a teacher when I turned 40! I didn't foresee the pensions part of my career at that time...

Warm Welcomes



Marcin Obolewicz

New Members Officer – Trainee

Hi, I am Marcin, I joined the pensions team in September, and I am looking forward to learning everything about pensions.

I have lived in Surrey for over ten years, and I have become very fond of the county and what it has to offer.

Experience: Prior to joining SCC, I volunteered and worked in charity shops.

My enthusiasm and energy quickly lead me to promotion and becoming a manager.

This gave me the opportunity to meet people and build relationships with communities across Surrey.

Thanks to talking to my customers, I have learnt first-hand what they care for and what are their biggest worries.

Surprisingly, being a pensioner, or becoming one in the future, lies heavily on many people's minds. Knowing that, will motivate me even more to excel in my new role.

Skills: I am highly proficient at snacking throughout the day; you will rarely see me without a biscuit in my hand.



Besides that, I believe that I am a strong communicator and a good team player.

I always try to see the bigger picture and be open to change and improvement.

I am also good at organising and prioritising my tasks, which helps me in delivering at pace.

Interesting fact: Apart from motorbiking with my partner, I enjoy getting muddy in our garden.

Warm Welcomes



Emily Stanfield

Senior Project Specialist

Hi, I am Emily Stanfield and I joined Surrey at the beginning of September as a Senior Project Specialist. I have really enjoyed my first week here, everyone I have met so far has been very welcoming, friendly, and approachable. I look forward to meeting the wider team at the forthcoming whole of Pensions Team meeting.

Experience: I have 5 years' experience working in the LGPS and have held a variety of positions across pensions administration. Prior to joining Surrey, my previous job was with Worcestershire Pension Fund where I assisted in a variety of project and administrative tasks ranging from Starter creation to Admission agreements and member pension options.

I have also worked for Aspens Services which are predominantly a school catering company that held over 30 different LGPS contracts across the country handling their admission agreements and their day-to-day pension functions.

Skills: My main skills are listening, organising, and acting as a mediator. I can usually see both sides of a story and suggest ways of moving forward or improving to standardise and simplify a task.

Interesting fact: I am a massive stress baker! There is usually some sort of home-baked goods in my house when I am feeling overwhelmed.



**If you have any new Starters, are a new Starter yourself,
or are moving into a new role, please let us know!**

Email your filled out profile to:

pensions.communications@surreycc.gov.uk

The Dakota Dashboard

Office Updates

Book the Business Lounge for meetings

If you want to book the lounge on the ground floor, please contact 1st floor reception in Dakota as it is not available on Manhattan.

But please be aware that between 12-2pm every day we need to keep the Business Lounge free to allow people to have their lunch.

Battery disposal bin now available

A battery disposal bin is available from the 1st Floor Reception's table.



Staff parking arrangement survey review - have your say!

Staff across the council can share their views on the previous scheme and future decisions around the potential reintroduction of a parking arrangement. The survey will close at 12pm on Tuesday 4 October. **[Click here to complete the survey.](#)**

[Select here](#) to become part of the Dakota Teams Group & find out the latest updates!

The Dakota Teams Group is the place to:

- **Report facility issues**
- **Find out the latest**

Please be aware that one of our colleagues on the 1st Floor has a severe nut allergy who works on the 1st Floor.

To protect them we ask that you do not bring in or consume nuts on the 1st Floor of the office.

Thank you for your co-operation.

Sow the Seed



What would you like to see improved?

Ask yourself:

- ♦ Are there any error messages you keep seeing in Altair?
- ♦ Are you always having to edit a document in the same way?
- ♦ Are you constantly being asked the same questions?
- ♦ Is there a letter that you never use?
- ♦ Is there any information you think might be missing from a piece of documentation?
- ♦ Got any changes (no matter how small) that you would like to see?

Submit your idea highlighting a problem to

sowtheseed@surreycc.gov.uk

to win an hour of Flexi-time and sow a seed for improvement!