

# Pensions Team Newsletter

October 2022



HELLO!

Welcome to the monthly Pensions Team Newsletter



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# Bulletin Breakdown!

## *LGA Bulletin Updates*



### Clarification on Calculating protected Final Pay

Following a query on how to calculate protected Final Pay, the LGA have provided an example on pages 4 & 5 of [Bulletin 229](#).

### Letter about discrimination in the LGPS sent to minister

On 26 August 2022, Cllr Roger Phillips, Chair of the SAB, wrote to the Local Government Minister, Paul Scully. The letter to the minister recommends amending the regulations on death grants and survivor benefits.

The SAB expressed concern about continuing to restrict death grants to cases where the member died before age 75. It considers the restriction may be at risk of legal challenge and should be removed.

The SAB reminded the minister that the LGPS rules on survivor benefits have not yet been amended to reflect the Goodwin judgment. It has previously recommended the Government investigate the feasibility of removing all differences in the survivor benefit rules.

### HMRC Newsletter

On 31 August 2022, HMRC published [pension schemes newsletter 142](#). The newsletter includes articles:

- normal minimum pension age – updates to the pensions tax manual
- migrating your pension schemes – take action now
- Accounting for Tax returns – can no longer be completed for any quarter from 1 April 2020 using the pension schemes online service
- new scams strategy from The Pensions Regulator – see bulletin 228 for more information.

[You can read the full Bulletin \(229\) here.](#)



## What's New?

### Responsible Investment Consultation Update

#### Investment Team

Firstly, a reminder to complete your Responsible Investment Consultation survey before it closes on 6 November.

We're happy to announce that we have had over 5,600 responses to the survey so far!

Once the survey closes we will be analysing the responses and comments from members and the general public. The findings of the consultation will then be discussed by the Surrey Pension Committee in January with the results of the survey also being published on the Surrey Pension Fund website.



### Button V - Future Payroll Numbers Set to Start at S1500001


#### Collin Bibb

I picked up that the manually assigned Payroll Numbers on “**Retirements and Dependants #Special-V1**” were getting very near to S1010000. Given the automated Altair numbering starts at 1010000 I wanted to try and avoid confusion with very similar payroll numbers (for example when a member contacts us, or an immediate payment is being processed).

To help avoid any mix-ups I have made a jump in the numbering on the Excel sheet “**Retirements and Dependants #Special-V1**”, with payroll numbers in future starting at S1500001.

The Excel sheet works just the same as before, and the only difference is the jump in the payroll numbering. For clarity, any payroll numbers already assigned **do not** need to be updated as part of this change.

While updating this I saw there several old tabs on the Excel sheet that took a long time to load and save and are no longer used so I have archived these. I have also archived payroll numbers set up before July 2022.

The archive file is in the folder: Marco Files >  [Archive](#)

Hopefully this is a very straight forward update but if there are any issues, please let me know and copy in Pensions Technical.



## What's New?

### Wellbeing Roadshow

The team were invited to set up a pensions stall at the cost-of-living marketplace event Wellbeing Roadshow. The whole event went really well and Ellie, Matthew and Chyna were able to help a lot of people with their pension queries.

There are 2 more Wellbeing Roadshows planned for November:

- Quadrant Court on 9 November
- Dakota on 24 November



If you would be interested in helping out, speak to Tom Lewis and let him know.

If you would be interested in attending, [tickets can be booked on Jive](#).

### Update on the Post

Fiona Jackson

We are happy to share that the digital mail seems to be working well. We are now only in the office once a week to pick up any physical mail that has bypassed this, and the amount of this is now very minimal.

We have agreed with MHD a 48 hour turnaround from receiving the PDFs to picking them up and setting up any relevant cases/attaching documents to records.

### Certificate in Pensions Administration Course

Jennifer Stevenson

Registration for this year has now closed. If you would like to study for a qualification, enrolment for the next course will start in the spring. Further details to follow so watch this space!

## What's New?

### Shared Drive Spring Clean

#### Change Team

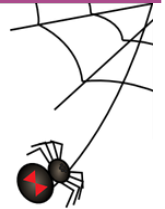
We are looking at centralising where we store our documents. To do this we need to spring clean the areas we currently use - but we can't do it alone!

As a team and as an individual, can everyone please start looking at some of the non-essential items that you have saved and review them during periods of downtime.

Ask yourself, do we still need these?

Examples of files that could be deleted:

- Previous years' Christmas Rotas
- Outdated birthday lists
- Unused draft templates
- Outdated presentations
- Historic Stationary Lists
- Historical Signatures
- Un-openable files
- Blank Screenshots
- Outdated Newsletters

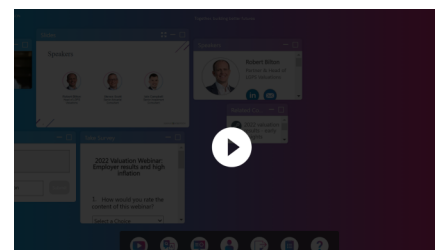


### 2022 LGPS Valuation: Employer Results Webinar

#### Hymans Robertson

Hymans have released their latest LGPS webinar titled '2022 LGPS Valuation: Employer Results and High Inflation On-demand'.

If you are interested in catching the webinar, [click here to access the webinar at a time convenient to you.](#)







## CELEBRATING YOUR SUCCESS

We've just finished another successful bout of sending Pension Saving Statements for another year. This really was a whole of pensions team achievement worth celebrating.

We have some staff specifically assigned to the project but then staff were assisting other teams due to this. We also had help with the checking in our second week and help with sending the statements to members as well.

We also appreciate that the staff left on teams will have seen an increased workflow during this period too. Overall we reviewed nearly 300 records and sent over 100 statements to members. Thank you everyone!

**David Hodgson**

A shout out to Ellie, Matthew and Chyna for volunteering at short notice, to represent the pensions team by having a stall at the financial wellbeing event, held at Woodhatch on 18 October. Your continued enthusiasm for pensions is a credit to yourselves and much appreciated by the team. Thank you! 😊

**Fiona Jackson**

**Affy Faderani**

Has been with us for four weeks now and has already made great progress in terms of learning processes and actioning emails which is contributing to clearing the inbox backlog.

**Natalie Hall**

Has been with us for two weeks and is already our 'transfers' expert and is making great progress in working through the transfers request back log. She is getting stuck in on the phone lines and has progressed from the MSS line to the mainline very quickly!

**Rahul Sharma**

Has been with us for one week and has made great progress in terms of his knowledge around the LGPS. He is already taking calls on the MSS line and is doing amazingly well.

**A massive thank you to all three for taking ownership of their learning and for their willingness to jump right into customer conversations.**

**Leigh Bouteloupt**

## CELEBRATING YOUR SUCCESS

**Jowan Mustafa** has been a real asset in training our new joiners. She has been thinking about how she felt when new to role and tailoring her training with that mindset.

Due to limited resource, she has had three observing her at one time, at times, whilst also taking calls! which could have been pretty stressful, however, she kept her cool and carried on. She is always the first to support by answering questions via Teams, which has been invaluable, especially when the newbies have a customer on the phone. A massive thank you and well-done Jowan. You are appreciated.

Special thank you's to **Jayne Meadows** who organizes training like a military operation and has redesigned and simplified training material. And **Amanda Cutter** who has been supporting all of us, as always. Me in particular!

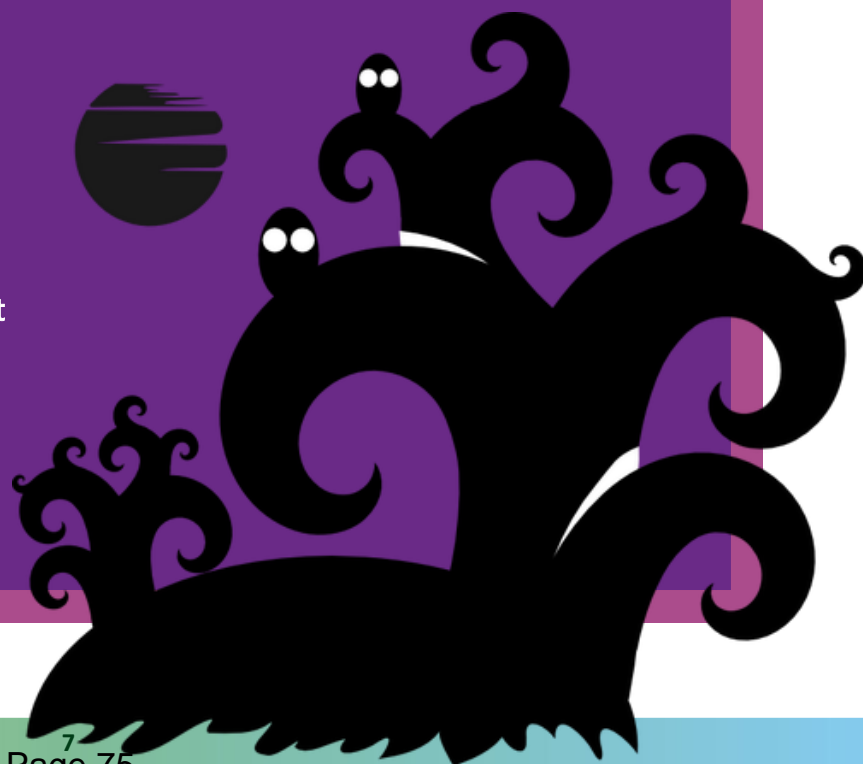
Leigh Bouteloupt

Best of luck to Chyna, Hilah and Marcin who have just started their Certificate in Pensions Administration course!

Jennie Stevenson

A huge thank you to the entire Helpdesk team for answering an increased number of calls as a result of the Responsible Investment Consultation. You've been amazing as always providing your excellent service to members.

Beth, Mel & Mandy





## The Dakota Dashboard

### Office Updates

#### Hot drinks machine in the Business Lounge

The hot drinks vending machine is now up and running in the Business Lounge—perfect for those cold days when you don't want to trapse to Tesco.

#### Don't Forget about the Sandwich Van!

Visiting every Tuesday, Wednesday & Thursday at 11:15am. Check the Dakota Teams Group for an update as to when the sandwich van has arrived.



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

The Dakota Teams Group is the place to:

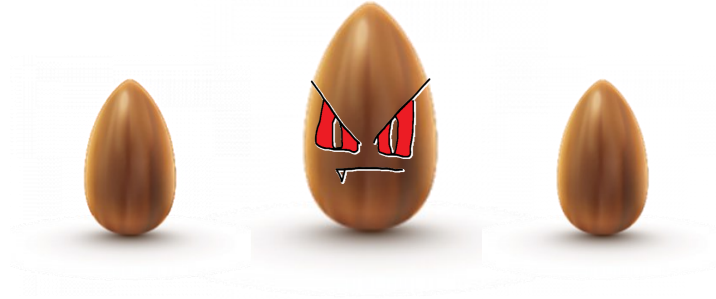
- Report facility issues
- Find out the latest news & updates

A reminder that if you get Pension magazines sent to the office, they are waiting for you at the 1st Floor Reception.

Please don't forget to collect them (or cancel if you no longer want them).



# 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](mailto:sowtheseed@surreycc.gov.uk)**

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

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