







**Surrey Fire & Rescue Service
Performance Delivery Report**

Q4 2024-2025

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01 Overview

XPS are pleased to provide our quarterly governance report for Surrey Fire & Rescue Service which is in respect of 1 April to 30 June 2024. Due to the timing of this meeting some statistics will only cover the Quarter to 31st May 2024 but will be updated for the next report.

We must acknowledge that it has been a particularly challenging period for the administration teams since 1 October for a number of reasons and that our service has not been at the level which we have been used to providing to our clients. Prior to 1 October the administration teams benefitted from automation of calculations however this level of automation was lost from that date which meant that all calculation work became manual. Although there were plans for automation to be introduced for McCloud this has been planned across 2023/24 and 2024/25 (and is still ongoing) and hasn't been at the pace that XPS originally expected (though XPS and NPCC are working with the software provider to have this in place as soon as possible). This significantly increased the time required for an individual member calculation - in some cases this more than tripled the time taken to complete a calculation. This was also compounded by the requirement to receive additional member data from the Fire Authority to allow XPS to produce the two calculations required for the McCloud remedy.

XPS have been implementing a number of measures to improve the overall level of service and to counteract this loss of automation/further data requirements.

- APT tool - In the absence of automation on our pensions software, XPS have built and tested our own calculation tool which was deployed within the administration team during February 2024. This has helped to improve the time taken to perform calculations and has removed some of the manual elements of this work.
- Resources - XPS have reviewed the structure of our administration department and are making some changes. We are introducing an additional tier of management to the structure and have also appointed 4 new members of staff to the administration teams. These 4 new employees joined XPS during March 2024.
- Client relationship Team - XPS are also introducing 3 new Client Relationship Managers to the structure to help support our clients. Two roles have applicants shortlisted for a second interview and appointments are expected soon.
- Training - Significant training has been delivered to the administration team in light of the more manual nature of the work and the increased processing times
- Triage team - XPS have introduced a triage team to help manage member contact and expectations.

XPS are in regular dialogue with the LGA, keeping them abreast of developments with our service and monitoring our overall service delivery. After a very challenging number of months since 1 October, it is clear that there are positive signs that our service is on the right trajectory and starting to return to pre 1 October levels.

02 Member Self Service

The tables below provide information on the number of Surrey Fire & Rescue 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.

Quarter 4 2023/24	REGISTERED	ACCOUNT DISABLED	ACTIVATION LINK SENT	NOT REGISTERED	TOTAL	% Up Take
Actives	315	2	4	296	615	51.5%
Deferred	104	0	5	179	288	36.1%
Pensioner	302	5	15	540	857	35.8%
Widow/Dep	21	0	1	137	159	13.2%
Total	742	7	25	1,152	1,919	39.0%

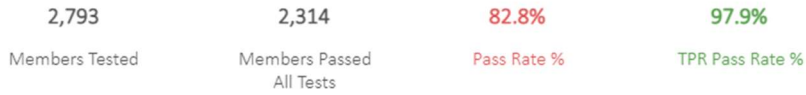
<i>Fire Scheme Averages for comparison</i>						
	REGISTERED	ACCOUNT DISABLED	ACTIVATION LINK SENT	NOT REGISTERED	TOTAL	% Up Take
Actives	15.4%	0.2%	0.7%	13.8%	862	15.4%
Deferred	6.2%	0.1%	0.3%	13.3%	348	6.2%
Pensioner	14.4%	0.2%	0.7%	27.8%	810	14.4%
Widow/Dep	0.6%	0.0%	0.0%	6.7%	36	0.6%

Age Profiles for Members who have registered for self-service			
Under 22	0.00%	Aged 46 - 50	20.00%
Aged 23 - 25	1.29%	Aged 51 - 55	22.90%
Aged 26 - 30	9.68%	Aged 56 - 60	6.77%
Aged 31 - 35	10.00%	Aged 61 - 65	1.61%
Aged 36 - 40	8.71%	Aged 65+	0.32%
Aged 41 - 45	18.71%		

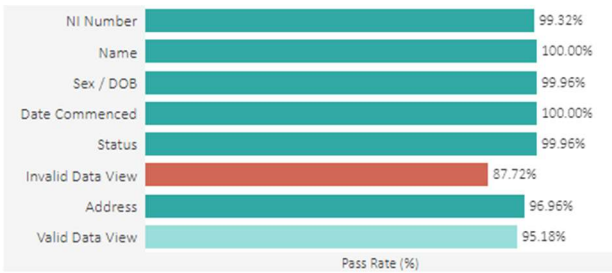
03 Data Quality

Common Data

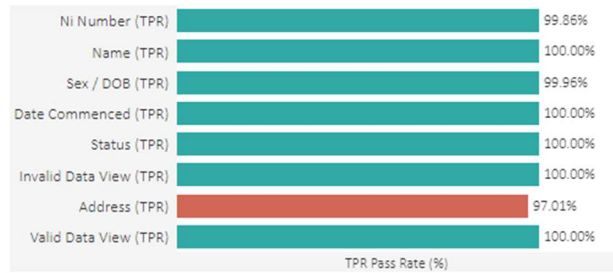
Data Quality | Summary



Pass Rate % by Test Category



TPR Pass Rate % by Test Category

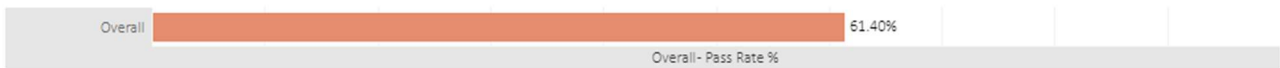


Scheme Specific Data

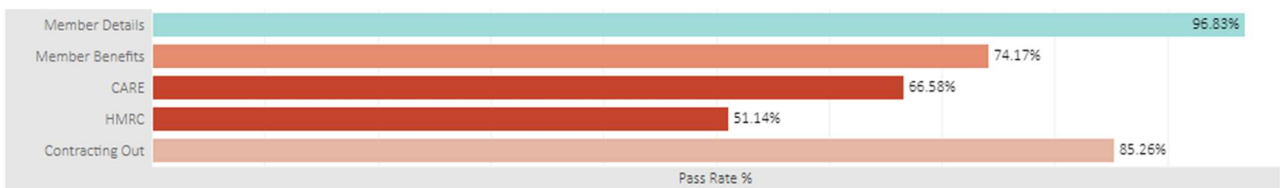
Police and Fire Scheme Specific Data Quality | Overall Summary



Grand Total | Pass Rate %



Grand Total | Pass Rate % by Test Category



04 Completed Cases Overview

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

	Cases completed	Cases completed within the target	Cases completed outside the target	Cases: % within target
April	64	48	16	75%
May	31	12	19	39%
June	28	17	11	61%
Quarter 1	123	77	46	63%
July				
August				
September				
Quarter 2				
October				
November				
December				
Quarter 3				
January				
February				
March				
Quarter 4				
Year - Total	123	77	46	63%

Conclusion

This quarter has seen the continuation of the issues faced by XPS in the post remedy period. One area of note is the high volume of 'General' cases that were completed late. If these cases were removed from the overall SLA reporting the achievement rate moves to 86% for April, 70% for May, and 80% for June.

The General workflow is something of a catch all, in that it is used when there are no calculations involved and no other discrete workflow and over this period this task had been used to reflect the increased contact we had received from your members, rather than a separate workflow. Although these numbers are included within the report, they will not fully reflect work completed on your behalf, but rather the contact from members received.

05 Completed Cases by Month

Q1 April 24					
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	-	-	-
Divorce Cases	30	100	-	-	-
Estimates	10	100	9	5	56
General	10	100	14	5	36
Processing new entrants	10	90	22	22	100
Refunds	10	100	-	-	-
Retirement Actual	5	100	2	2	100
Retirement Options	10	100	-	-	-
Transfers – in (Calculation)	10	90	1	1	100
Transfers – in (Payment received)	10	90	-	-	-
Transfers – Out (Calculation)	10	100	-	-	-
Transfers – Out (Payment)	10	100	-	-	-
Variations	10	90	14	13	93

Q1 May 2024					
Service	Days	Minimum Target	Cases	Within Target	Actual Performance %
Death in Service	5	100	-	-	-
Death of a pensioner	5	100	-	-	-
Deferred Benefits	10	90	-	-	-
Divorce Cases	30	100	2	1	50
Estimates	10	100	1	0	0
General	10	100	21	5	24
Processing new entrants	10	90	-	-	-
Refunds	10	100	-	-	-
Retirement Actual	5	100	-	-	-
Retirement Options	10	100	2	1	50
Transfers – in (Calculation)	10	90	-	-	-
Transfers – in (Payment received)	10	90	-	-	-
Transfers – Out (Calculation)	10	100	-	-	-
Transfers – Out (Payment)	10	100	-	-	-
Variations	10	90	5	5	100

Q1 June 2024

Service	Days	Minimum Target	Cases	Within Target	Actual Performance %
Death in Service	5	100	-	-	-
Death of a pensioner	5	100	1	1	100
Deferred Benefits	10	90	-	-	-
Divorce Cases	30	100	1	1	100
Estimates	10	100	4	3	75
General	10	100	8	1	13
Processing new entrants	10	90	1	1	100
Refunds	10	100	-	-	-
Retirement Actual	5	100	2	2	100
Retirement Options	10	100	7	5	71
Transfers – in (Calculation)	10	90	-	-	-
Transfers – in (Payment received)	10	90	-	-	-
Transfers – Out (Calculation)	10	100	-	-	-
Transfers – Out (Payment)	10	100	-	-	-
Variations	10	90	4	3	75

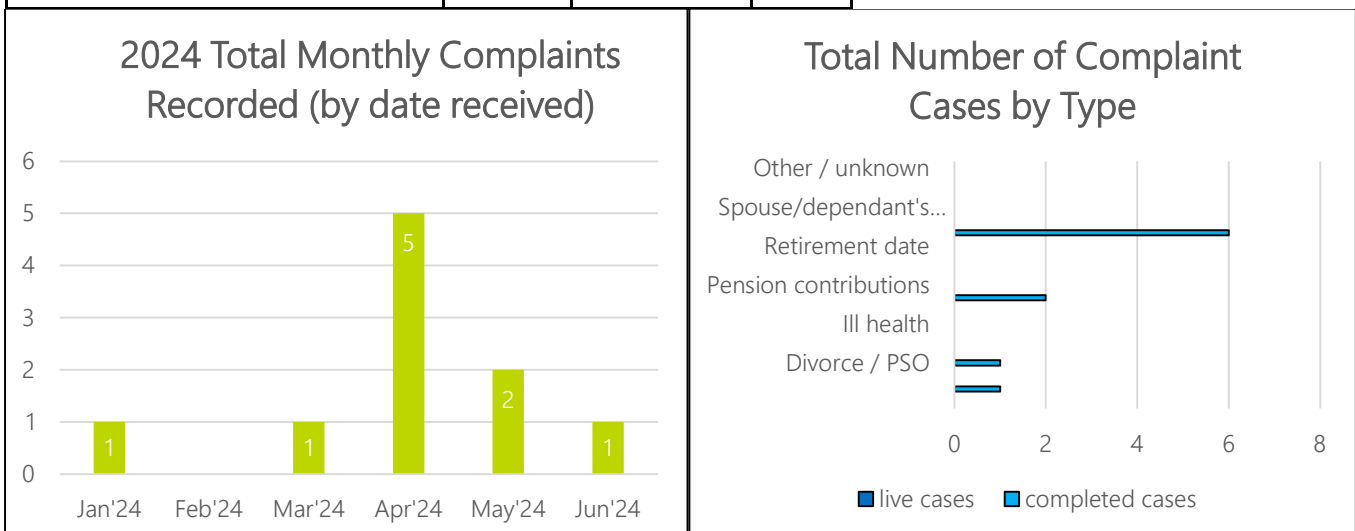
06 Complaints

	Jan'24	Feb'24	Mar'24	Q4	Apr'24	May'24	Jun'24	Q1
Total number of cases	1	0	1	2	5	2	1	8

The type of complaint is shown in the below table:

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

Total	0	10	10
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07 IDRPs

Description	Date received	Date completed	Comment
Nil			

08 McCloud Update

Although there is no statutory date that a commutation amount needs to be paid after retirement XPS have been providing an overview on when payments have been made beyond the members retirement date. The chart below shows how this has tracked since the two months prior to McCloud to the end of February (note, this covers all the XPS police and fire clients and is not specific to you - this is to show the underlying trend):

Payment Made	Aug-23	Sept-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24
On DoR	47.24%	43.29%	25.85%	38.78%	36.02%	36.20%	36.20%	25.27%
< 7 days of DoR	36.68%	35.98%	25.42%	28.06%	31.72%	33.48%	37.42%	32.97%
7+days of DoR	16.08%	20.73%	48.73%	33.16%	32.26%	30.32%	26.38%	41.76%

Payment Made	Apr-24	May-24	Jun-24
On DoR	25.21%	34.76%	54.38%
< 7 days of DoR	33.33%	31.71%	32.50%
7+days of DoR	41.45%	33.54%	13.13%

Your payment profile is:

Payment Made	Aug-23	Sept-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24
On DoR	-	-	33.33%	-	0.00%	0.00%	-	0.00%
< 7 days of DoR	-	-	33.33%	-	0.00%	0.00%	-	33.33%
7+days of DoR	-	-	33.33%	-	100.00%	100.00%	-	66.67%
Cases	0	0	3	0	1	1	0	3

Payment Made	Apr-24	May-24	Jun-24
On DoR	-	0.00%	-
< 7 days of DoR	-	0.00%	-
7+days of DoR	-	100.00%	-
Cases	0	2	0

Finally, we understand that members will continue to have an interest in the progress of the Immediate Choice McCloud remedy, and we will provide additional updates as the project proceeds, appreciating there is a keen interest in the timing of RSSs being issued.

09 Regulations and Guidance

April 2024

LGA issued Bulletin 80

Bulletin 80 covered many topics with the following actions arising, see below:-

Age Discrimination

FRAs should inform their administrators as to the choice they have made with regards to possible ways forward.

Administrators should use the new IC-RSS templates with the additional wording where the FRA has chosen to give the member a choice with regards to the payment of interest.

FPS 2015 Added Pension Factsheet

The FPS 2015 Added Pension Factsheet has been updated to reflect the 2024 annual update from 1 April 2024.

The updated version of the factsheet should be used for all added pension elections following 1 April 2024. The factsheet is available on the factsheet section of the FPS regulations and guidance website

Matthews and Age discrimination remedy Query logs

Three query logs created to record the technical queries LGA have received:

- Age Discrimination remedy technical query log
- Matthews technical query log
- Matthews GAD calculator query log

May 2024

LGA issued Bulletin 81

Bulletin 81 covered many topics with the following actions arising, see below:-

Age Discrimination Remedy – Compensation guidance

Scheme managers should familiarise themselves with the compensation scheme manager guidance and the Home Office compensation funding guidance.

Age Discrimination Remedy – Statutory deadlines

Scheme managers should familiarise themselves with the statutory deadlines, to ensure that where possible they are adhered to.

Age Discrimination Remedy – Contingent Decisions

Scheme managers should familiarise themselves with the updated guidance, to ensure that they are aware of the updated position. They are also encouraged to report any contingent decision claims and their outcome to their local pension board.

Update on Tax Treatment of Matthews cases

Scheme managers should ensure that they have familiarised themselves with the email and the recommendations and update their administrators of their relevant decision for processing these cases.

June 2024



Graeme Hall
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