

**DEVON & SOMERSET FIRE & RESCUE AUTHORITY**

**LOCAL PENSIONS BOARD**

<b>DATE OF MEETING</b>	<b>07 September 2022</b>
<b>SUBJECT OF REPORT</b>	<b>SCHEME MANAGER UPDATE</b>
<b>REPORT AUTHOR</b>	<b>HR Rewards &amp; Benefits Manager</b>
<b>EXECUTIVE SUMMARY</b>	<p>This report provides a summary of current pension matters both nationally and locally which have required input from the Service. This report should also be considered in conjunction with the regular monthly Bulletins which are issued by the Firefighters' Pensions Scheme Advisory Board.</p>

## **1. INTRODUCTION**

- 1.1. This is the update report from the Devon & Somerset Fire & Rescue Authority (the Authority) delegated Scheme Manager for the Authority's Local Pension Board (the Board). The Scheme Manager is defined as being the Fire and Rescue Authority under The Firefighters' Pension Scheme (England) Regulations 2014. However, the Scheme Manager may delegate any functions under these Regulations. The Authority has set out in the Discretions Policy where decisions will need to be taken by the Authority. The day-to-day managing and administering of the pension schemes and any statutory scheme that is connected with them, is delegated to the HR Rewards & Benefits Manager.
- 1.2. The Board provides a number of functions as set out in the Terms of Reference, which include:
- assisting the Scheme Manager to ensure compliance with the relevant regulations and the efficient and effective management of the pension administration;
  - advising on member communications; and
  - monitoring complaints.
- 1.3. This report provides a summary of current pension matters both nationally and locally and further updates will be provided at subsequent Board meetings.

## **2. GOVERNANCE & STRATEGY**

### ***FPS Administration, Management and Governance Strategy***

- 2.1. Further to the last Board meeting, this is to report that the governance strategy document has now been finalised for publication on the Pensions section of the Service website and sign off within the Service's Policy Management System is currently underway. In the meantime, the document is included for views of the Board elsewhere on the agenda for this meeting.

## **3. PENSION COMMUNICATIONS**

### ***Annual Benefit Statements***

- 3.1. There is a legal requirement to provide an Annual Benefit Statement (ABS) to all active members by no later than the 31 August each year. West Yorkshire Pension Fund (WYPF) has confirmed that it has produced Annual Benefit Statements for 100% of eligible members. The Service has been advised that Remedy has not been taken into account in this year's statements, and that both the statement and the web notes confirm this and provide more detail around Remedy, including when WYPF expects it to show on future statements.

#### **4. PENSION PROJECTS**

##### ***2015 Remedy (Sargeant)***

- 4.1. It has been noted by Executive Board colleagues that a number of FPS members have expressed their frustration at the uncertainty presented by the Age Discrimination Remedy implementation process and the withdrawal of the Home Office guidance. The Service is in the process of writing to all members affected by Immediate Detriment to outline what information and resources are currently available to them in the intervening period. The HMRC and Home Office position on the treatment of Immediate Detriment will continue to be closely monitored.

#### **5. REPORTING BREACHES OF LAW**

- 5.1. Within the Board's Reporting Breaches Procedure, Section 70 of the Pensions Act 2004 (the Act) is referenced. This requires that, where a person has reasonable cause to believe that:
- (a) a duty which is relevant to the administration of the scheme in question, and is imposed by virtue of an enactment or rule of law, has not been or is not being complied with; and
  - (b) the failure to comply is likely to be of material significance to the Regulator in the exercise of any of its functions then they must give a written report on the matter to the Regulator as soon as is reasonably practicable.
- 5.2. There have been no breaches reported since the last Local Pension Board meeting.

#### **6. INTERNAL DISPUTE RESOLUTION**

- 6.1. Within the Firefighters' Pension Scheme formal complaints are made via the Internal Disputes Resolution Procedure (IDRP). There have been two complaints received under this procedure since the last Local Pension Board meeting.

#### **7. PENSION ADMINISTRATOR QUALITY OF SERVICE AND KEY PERFORMANCE INDICATORS**

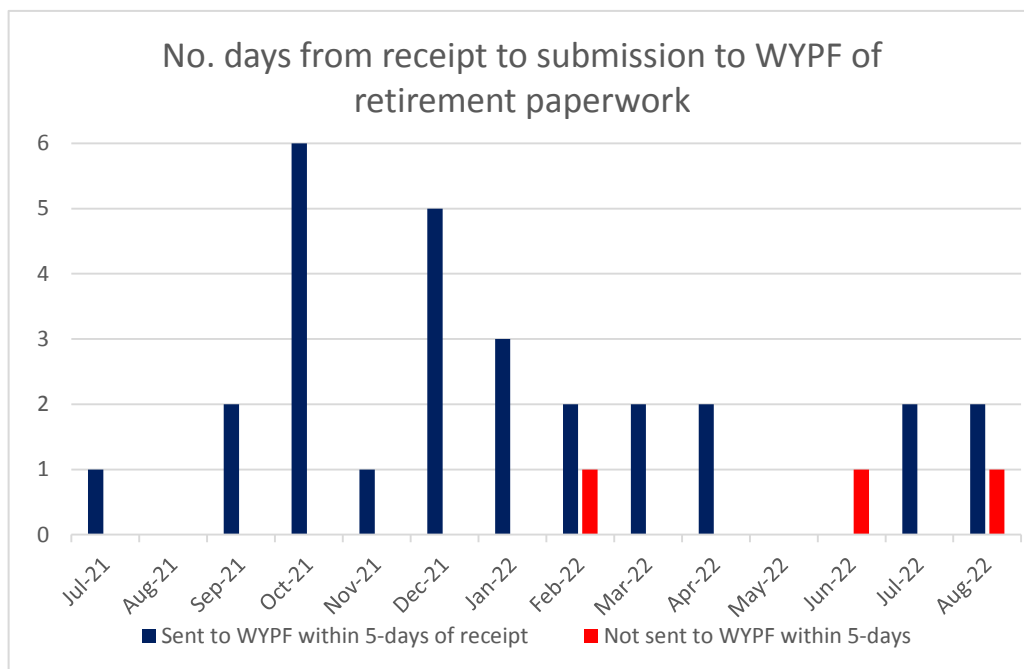
- 7.1. The Service is continuing to collaborate with WYPF and to periodically review the arrangements in place to identify potential improvements that can be made. It has been noted that there is not a clear alignment between the KPIs listed in the Service contract and the monthly reports issued by WYPF. There have also been some concerns in recent months regarding the time taken by WYPF both to update member records following submission from the Service and for some other administrative processes, such as setting up deferred benefits and merging pension accounts. These concerns are being addressed at the contract review meeting later this month. Data submissions to WYPF are summarised overleaf.

**(a) Submission of monthly pension reporting to WYPF by the last day of the month:**

7.2. For 10 out of the last 12 months, the Service has achieved this KPI, as detailed below.

Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22
23 Sep 21	25 Oct 21	26 Nov 21	22 Dec 21	24 Jan 22	01 Mar 22	07 Mar 22	29 Apr 22	15 Jun 22	15 Jun 22	20 Jul 22	16 Aug 22

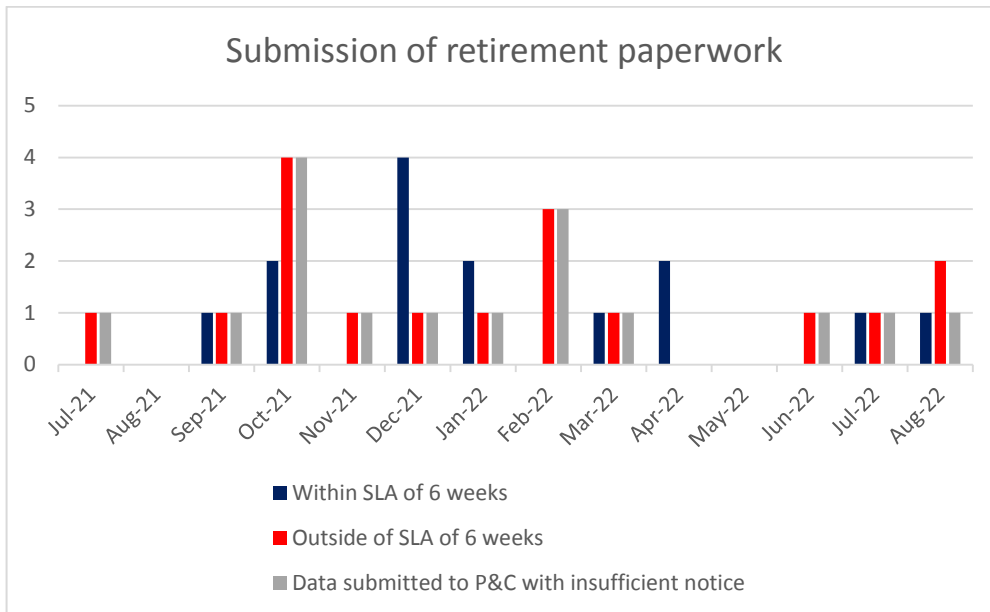
**(b) Notifications of normal retirement and timeframes for submission**



*May is not listed because there were no FPS retirements to record*

7.3. During the period since the last report, the Pay & Conditions team has submitted one notification of normal retirement to WYPF outside the SLA of within 5 days from member notification.

7.4. Since the last report, there have been a total of 6 retirements, 2 of which were not submitted within the 6-week timeframe (prior to retirement date) and in one of these instances, the paperwork was submitted within the 6-week SLA. This matter is being followed up with the team to identify what caused the delay.



*May is not listed because there were no FPS retirements to record*

**(c) Pensions Dashboard**

7.5. The Pensions Officer has been liaising with our Relationship Manager at WYPF to review additional data reports that are readily available. There have been some discrepancies identified between DSFRS and WYPF data, so rectifying this issue will be prioritised prior to establishing additional datasets for regular reporting and analysis.

**ZOE SMYTH**  
**HR Rewards & Benefits Manager**