

Public Document Pack

West Sussex Fire & Rescue Service

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07 March 2024

Dear Member,

West Sussex Fire & Rescue Service Local Pension Board - Thursday, 14 March 2024

Please find enclosed the following document(s) for consideration at the meeting of the West Sussex Fire & Rescue Service Local Pension Board on Thursday, 14 March 2024 which was unavailable when the agenda was published.

Agenda No	Item
6.	Administration Procedures and Performance Appendices A,B,C,D (Pages 3 - 26) Papers not available at time of despatch
7.	Communication Strategy Report and Appendix A (Pages 27 - 30) Papers not available at time of despatch

Yours sincerely

Tony Kershaw
Director of Law and Assurance

To all members of the West Sussex Fire & Rescue Service Local Pension Board

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Key decision: Not applicable
Unrestricted
Ref:

Report to West Sussex Fire & Rescue Service Local Pension Board 2023

14 March 2024

Administration Procedures and Performance

Report by Chief Fire Officer (Scheme Manager)

Summary

Pension Administration services have been provided by Hampshire County Council since 4 March 2019. The following are highlighted:

- There were 1,723 members in the West Sussex Firefighters Pension Schemes on 31 January 2024.
- Over the past 12 months, 94 casework items were completed by the team, and all are with the service level timescales. On 31 January 2023, 10 casework items were in progress with the team, West Sussex County Council, members or other third parties.
- 53% of members have registered to use the Member Portal which allows access to Annual Benefit Statement or payslips and the opportunity to update personal details. During the past 12 months, members have logged into the portal 1,779 times.
- On 1 October, changes to the Regulations to facilitate the McCloud remedy became effective. Alongside retirement casework, the focus from January has been to provide the immediate choice (IC) RSS for the first two cohorts of firefighters (ill health and the beneficiaries of deceased members).
- The Fire and Rescue Authority is also required to provide the option to retained Firefighters to join the Firefighters Pension Scheme (Matthews 2).

The Local Government Association (LGA) issue a bulletin at the end of each month which provide information about key events, changes to Regulations and guidance. The bulletins focus on McCloud Remedy and Matthews Second Options Exercise but also refer to the pension accounting data collection, Scheme valuation and pension dashboards. These have been summarised as an Appendix.

Recommendations

- (1) The update is noted.
-

1 Background and context

- 1.1 Hampshire County Council provides the Pension Administration Service for West Sussex County Council. The administration team work closely with the West Sussex Pensions Team and West Sussex County Council payroll.
- 1.2 The purpose of the Board is to assist West Sussex Fire and Rescue Authority in its role as a scheme manager of the Fire Fighters' Pension Scheme including to assist with improvements to customer service, monitor performance against indicators and assist with the development of improved administration and governance structures and policies.
- 1.3 The Pensions Board risk register recognises the following:
 - The risk that partnership expectations not met in delivery of administration service.
 - The increased resource associated with Scheme changes (O'Brien/Matthews, McCloud, Cost Cap)
 - The importance of data quality
 - A dependency on West Sussex County Council's payroll team.

2 Dashboard

- 2.1 A dashboard showing key information in relation to the West Sussex Firefighter Pension Schemes has been included in Appendix A.

3 Regulation and Guidance updates

- 3.1 The Local Government Association (LGA) issue a bulletin at the end of each month which provide information about key events, changes to Regulations and guidance. The work of the Fire LGA team provides support to the Fire sector nationally and ensures that, as much as possible, there is a consistent approach for Fire and Rescue Authorities to adopt. A summary of the items included are shown in Appendix B.

4 Project Work: McCloud

- 4.1 Since July 2019 work has been underway to fix the discriminatory protections given to members of the existing schemes (FPS 1992 and FPS 2006) when the Firefighters' Pension Scheme 2015 (FPS 2015) was introduced. This work has been undertaken at a national and local level in advance of 1 October 2023, when the Police and Firefighters' Pension Schemes (Amendment) Regulations 2023 came into force.
- 4.2 A highlight report has been provided as Appendix C.

5 Project Work: Matthews

- 5.1 A [Memorandum of Understanding \(MoU\)](#) was agreed in March 2022 to provide a remedy to eligible retained firefighters by offering access to the Firefighters Pension Scheme 2006 as special members, backdated to the start date of their employment. The MoU set out the scope and mechanism for the remedy to be implemented by way of a second options exercise.

5.2 A highlight report has been provided as Appendix D.

6 Project Work: Dashboard

6.1 The government led "Dashboard" project is intended to allow individuals to go to a single website and receive details of all the pensions they hold across UK pension providers.

6.2 There is no further update on the project since the Board met in December.

7 Breach Reporting

7.1 There have been no data breaches during the last 12 months and no breaches of the law which affect pension schemes and which should be considered for reporting to the Pensions Regulator.

8 Consultation, engagement and advice

N/A

9 Finance

N/A

10 Risk implications and mitigations

See background

11 Policy alignment and compliance

N/A

Sabrina Cohen-Hatton
Chief Fire Officer

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Appendices

Appendix A: Administration Activity

Appendix B: Summary of bulletins and correspondence

Appendix C: McCloud Highlight Report

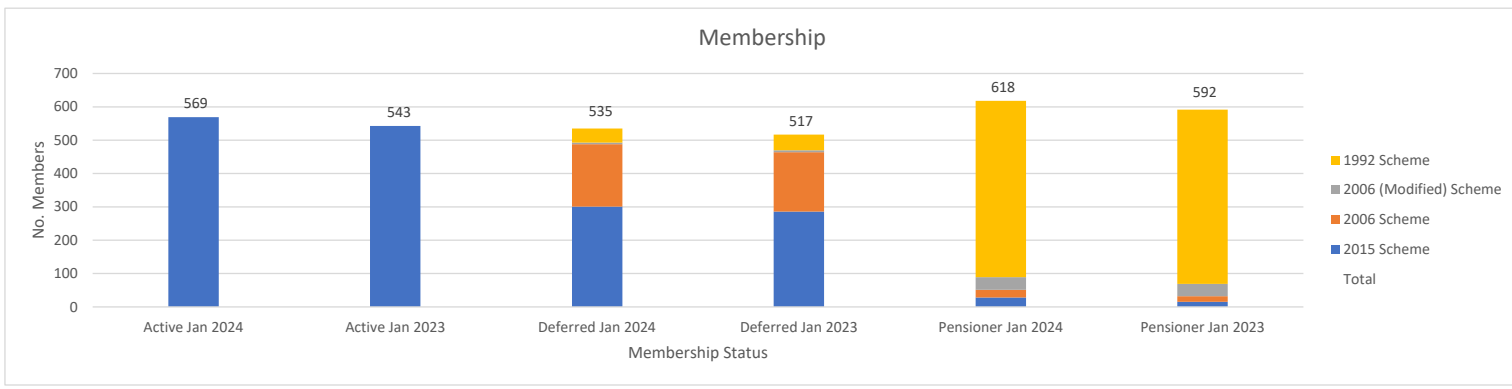
Appendix D: Matthews Highlight Report

Background papers

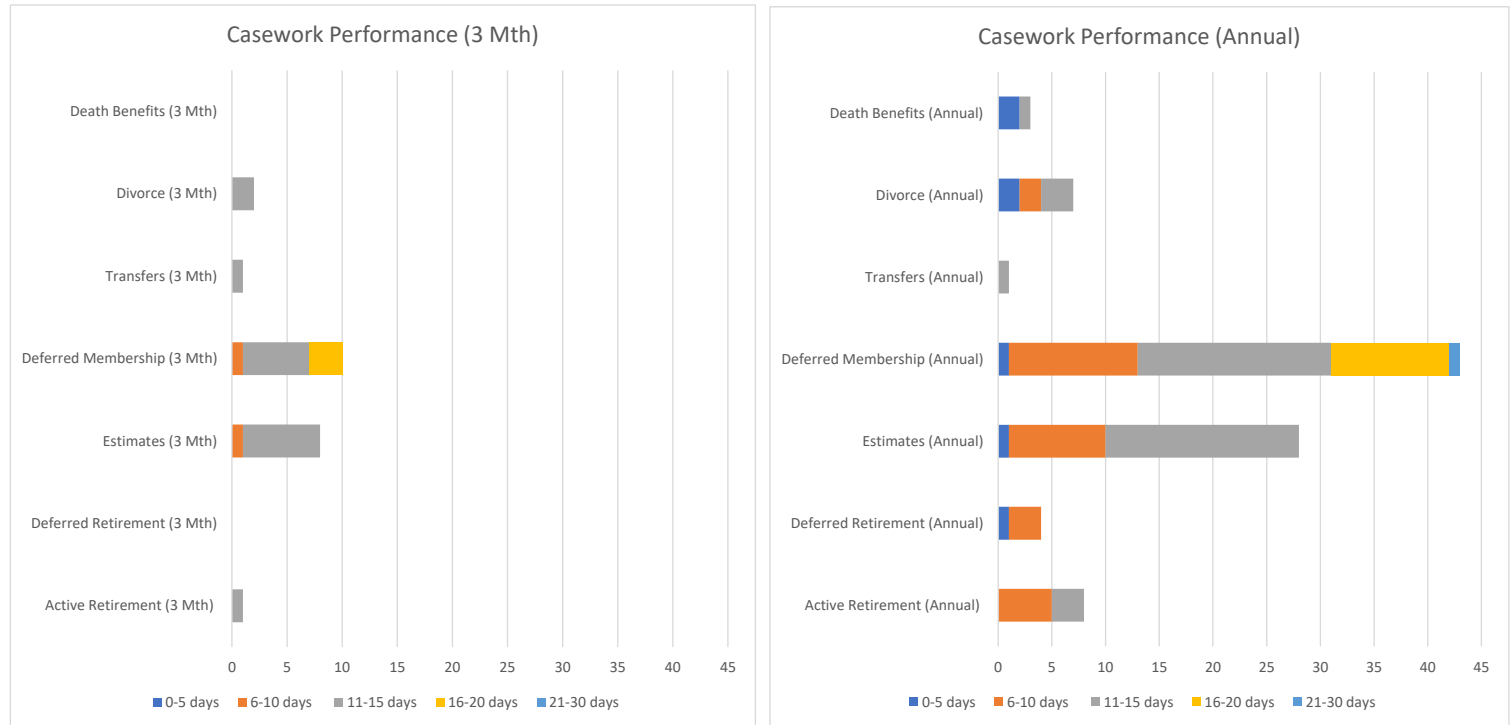
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Membership | Total January 2024 1,722 v January 2023 1,652 (+4.2%)



Casework Performance | SLA target 15 days (except deferred membership with a 20 days SLA)



Work in Progress at 31 January 2024

	0-5 days	6-10 days	11-15 days	16-20 days	21-30 days	31 days +	Total
Active Retirement				1	0	1	2
Deferred Retirement				1			5
Estimates	2	2	0	1			3
Deferred Benefits			3				

Pensions Regulator Data Quality Score

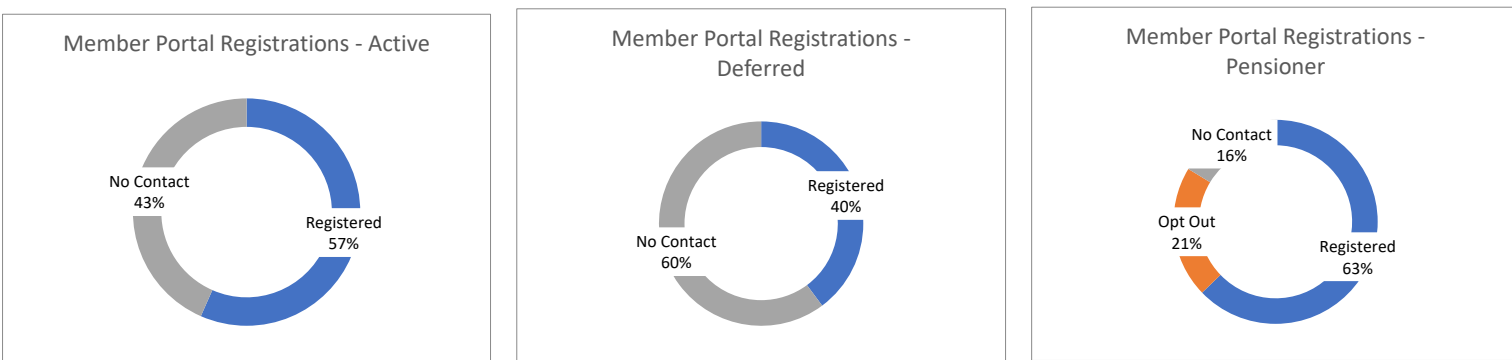
Common Data

98-99%

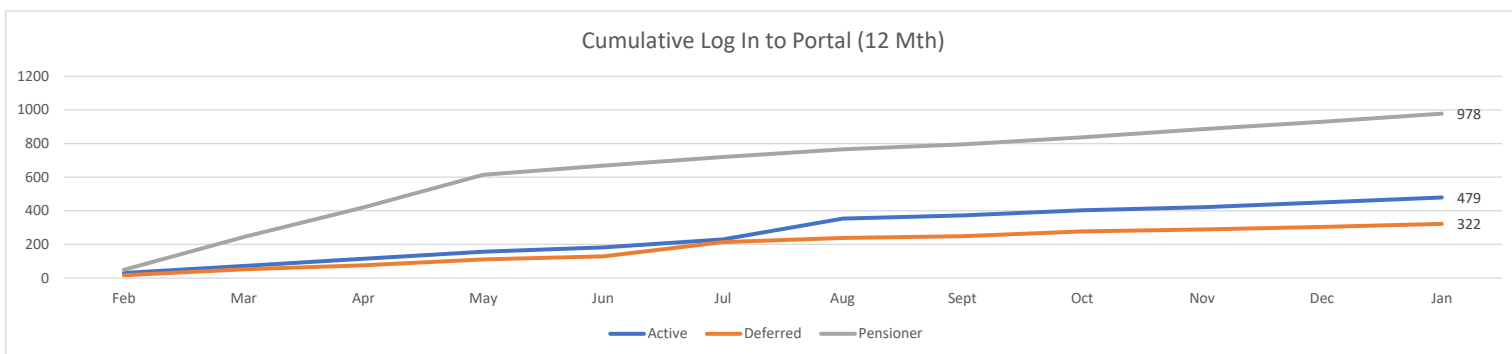
Conditional Data

98-99%

Portal Registrations at 31 January 2024



Portal Usage 1 February 2023 to 31 January 2024 by membership status



Annual Tasks

Period	Activity	Action	RAGB
January to March	Voluntary Scheme Pays (VSP) Tax Payments	Due to the McCloud Remedy no members received a pension savings statement for the year 2022/23 in line with guidance.	■
	Data Preparations for Scheme Year End	WSCC payroll and administration team are preparing for EOY	■
April to June	Annual Benefit Statement (ABS) preparation	The team are preparing templates and communications	■
	Employer data deadline	WSCC payroll and administration team are preparing for EOY	■
July to September	The Pensions Regulator (TPR) Survey results	Consideration of 2023 results (published in November 2023)	■
	Pension increases and Career Average Earnings	The increase will be applied by the administration team	■
October to December	Mandatory Scheme Pays deadline	No members received a pension savings statement for the year 2022/23 in line with guidance.	■
	ABS's published		■
October to December	Queries and reissuing of ABS's	Completed for 2023 and submitted on 25 January 2024.	■
	Pension Saving Statements published	TPR has not yet issued a 2023 Administration and Governance survey for completion.	■
	TPR Scheme Return deadline		■
	TPR Administration and Governance survey		■
	LGA Fire Pension AGM	Invitation to be shared when available	■

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McC = McCloud Remedy | Matt = Matthews Remedy | BAU = Business as Usual

Appendix B: Fire Correspondence

[December 2023](#)

[January 2024](#)

[February 2024](#)

Where topics are covered in multiple bulletins, these have been combined.

To help identify the topic, the following coding has been applied **McC** = McCloud Remedy | **Matt** = Matthews Remedy | **BAU** = Business as Usual

Month	Received from/subject	Code	Summary	Actions agreed
December	Fire Bulletin 76 – December 2023	Matt	FRAs to use the documents provided by the Local Government Association (LGA) for contacting beneficiaries of retained firefighters in scope of the Matthews exercise. FRA's can amend the templates where required.	Noted and Pensions Team have been discussed scenarios with the LGA.
December	Fire Bulletin 76 – December 2023 Fire Bulletin 78 – February 2024	Matt	FRAs are encouraged to use the Individual Statement of Details documents prepared by the LGA (and updated) to provide an individual who has expressed an interest with information on their options under the Matthews options exercise.	The Pensions Team are mapping the outputs of the GAD Calculator to the Individual Statement of Details documents prepared by the LGA in preparation for the bulk GAD Calculator being run by the Payroll Team.
December	Fire Bulletin 76 – December 2023	Matt	FRAs are advised to record and assess the materiality of any Breaches of the Law relating to the Matthews options exercise. This includes failure to provide notice to in scope employees or former employees. Any material breaches should be reported to The Pensions Regulator (TPR).	Letters were not sent to 20 individuals (3 relating to queries with name / address and 17 relating to pending guidance on beneficiaries).
December	Fire Bulletin 76 – December 2023	McC	FRAs are encouraged to discuss the timetabling of the Immediate Choice (IC) Remediable Service Statement (RSS) with their administrators. Administrators are asked to commence testing the use of the IC RSS and provide any feedback.	The Administration team have tested the IC RSS and provided feedback. Timetabling of IC RSS and required actions are regularly discussed with Administration team.
December	Fire Bulletin 76 – December 2023	BAU	FRA's are asked to ensure all contact details held by the LGA are up to date and amended and update as required.	Contact details have been updated by the Pensions Team
December January	Fire Bulletin 76 – December 2023 Fire Bulletin 77 – January 2024	McC Matt	FRAs to review updated technical query log which collates queries answered by the LGA on Matthews and McCloud.	Ongoing monitoring by the Pensions Team and Administration Team.
December	Fire Bulletin 76 – December 2023	BAU	HMRC will provide further details on the Government's Plan to fully abolish the lifetime allowance (LTA) from 6 April 2024 through a future LTA newsletter. Schemes are asked to remind members who have exceeded the annual allowance for tax year 2022/23 and do not have sufficient unused annual allowance to declare this on their Self-Assessment tax return, even if the Scheme is going to pay the tax charge.	Not applicable as those affected members are in scope for McCloud Remedy and therefore no Pension Saving Statement was required for 2022/23.

Month	Received from/subject	Code	Summary	Actions agreed
January	Fire Bulletin 77 – January 2024	McC	FRAs should note the amendment regulations in relation to Remedy and ensure that any special members who have service within the remedy period are assessed for ill health under both the legacy and reformed schemes accordingly.	Meeting previously held with LGA to discuss cases and in scope cases have been referred to IQMP to consider under the legacy and reformed schemes.
January	Fire Bulletin 77 – January 2024	Matt	Request for implementation data from the FRA relating to Matthews showing the total number of cases, letters sent and replies received in relation to an interest, statements issued and decisions.	Initial response sent for period 1 October 2023 to 31 December 2023 by 21 February 2024 deadline.
January	Fire Bulletin 77 – January 2024 Fire Bulletin 78 – February 2024	Matt	Second version of the GAD Calculator, user guide and query log published. Corrections have been made to the Matthews GAD Calculator version 2 which affected cases for members who retired between 22 March 2015 and 31 March 2015 (inclusive) and eligible members making an election to convert standard service to special service as part of their Matthews 2 election where members have service from the 1 April 2015 and benefits are in payment.	Latest calculator and guidance will be used by the Pensions and Payroll Teams.
January	Fire Bulletin 77 – January 2024	BAU	Home Office have requested member opt out data up to 31 January 2024 to inform their review of employee contributions.	21 February 2024 deadline met.
January	Fire Bulletin 77 – January 2024	Matt	LGA advise to stockpile cases which are not covered by the GAD calculator until GAD come up with a process for dealing with these.	Cases will be stockpiled as identified.
January	Fire Bulletin 77 – January 2024	McC	Guidance has been published on the impact of ‘roll back’ on Added Pension Contributions (APC). When a member is ‘rolled back’ to their relevant legacy scheme under the Age Discrimination remedy any APCs that have been paid between 1 April 2015 and 31 March 2022 must be returned to the member (added Pension arrangements do not exist in the legacy schemes).	There are no added pension compensation cases for West Sussex.
January	Fire Bulletin 77 – January 2024	McC	FRAs are advised to use the Data Sharing Agreement and follow LGA guidance if information is required from a member’s previous FRA for service in the remedy period.	Noted to be used if applicable cases arise.
January	Fire Bulletin 77 – January 2024	McC	LGA have produced guidance on Contingent Decisions.	The guidance has been used by the Pensions Team for the preparation of a policy for WSF&RS.
January	Fire Bulletin 77 – January 2024	McC	LGA have produced a factsheet on Remediable Service Statements.	The Administration Team will consider the publication of the factsheet.

Month	Received from/subject	Code	Summary	Actions agreed
January	Fire Bulletin 77 – January 2024	BAU Matt	LGA have published incorrect guidance relating to Injury pension calculation for a retained Firefighter appointed after 5 th April 2006.	No applicable cases for West Sussex.
January	Fire Bulletin 77 – January 2024	BAU	The Pensions Regulator has published the results of its Six Key Processes survey relating to the Firefighters’ Pension Scheme (FPS).	The results have been considered by the Pensions Team to inform planning.
January	Fire Bulletin 77 – January 2024	BAU	The Levy for 2023-24 has been agreed by the Home Office as £9.24 per active firefighter to be paid by FRA’s. The Levy pays for both the work of the SAB (£6.74) and the technical advice from the LGA (£2.50). The cost has increased due to increased legal costs relating to Remedy, actuarial advice relating to the 2020 valuation, a decrease in the number of firefighters to spread the cost between (from 34,196 in 2022/23 to 33,330) and a lower carry forward from 2022/23.	The required information will be provided by the Pensions Team to the LGA to support the invoicing process.
January	Fire Bulletin 77 – January 2024	BAU	SAB held a LPB effectiveness committee meeting on 23 rd January 2024 which considered arrangements for Local Pension Advisory Boards and training.	Pensions Team will review Board meeting papers
January	Fire Bulletin 77 – January 2024	BAU	FPS pensions will increase by 6.7% from 8 April 2024 in line with the increase in the Consumer Prices Index (pro-rata for pensions that started after 23 April 2023). Active FPS pension accounts will be revalued in line with changes in Average Weekly Earnings, i.e. 7.7% from 1 April 2024.	The increases will be applied by the Administration Team. The Pensions Newsletter updates pensioner members on the increase.
January	Fire Bulletin 77 – January 2024	BAU	The increase to the Guaranteed Minimum Pension element of an individual’s occupational pension entitlement effective from 6 April 2024 has been determined.	Noted. by administration team pending confirmation of factors to update software.
January	Fire Bulletin 77 – January 2024	BAU	The Pensions Dashboard Programme (PDP) has published a blog looking back to 2023 and FAQ newsletter FAQs: the central digital architecture	The Administration Team are considering information provided by the PDP.
January	Fire Bulletin 77 – January 2024	BAU	The Pensions Regulator General Code of Practice (GCOP) was laid in Parliament on 10 th January 2024 which covers reporting breaches of the law, early leavers, late payment of contributions, knowledge and understanding, internal controls, dispute resolution reasonable periods and the public service code,	The Pensions Team are reviewing the detail of the GCOP and preparing a compliance report.

Month	Received from/subject	Code	Summary	Actions agreed
January	Fire Bulletin 77 – January 2024	BAU	HMRC Pension input Aggregation (PIA) Consultation took place looking at provisions aimed to implement aggregation or negative PIA policy.	This is being considered by the Administration Team to determine whether a response is appropriate.
January	Fire Bulletin 77 – January 2024	BAU	HMRC Lifetime Allowance guidance newsletters published which notes that HMRC have contacted all FRAs with an information request relating to the Matthews first exercise and national insurance refunds.	Request being followed up by Pensions Team with response required to be provided by Pensions Team by 5 April 2024.
January February	Fire Bulletin 77 – January 2024 Fire Bulletin 78 – February 2024	BAU	Virtual Local Pension Board (LPB) training sessions advertised for 26/03/2024, 17/06/2024 and 23/01/2025. In person LPB training session advertised for 18/09/2024.	Dates advertised to the PAB and sessions booked where responses provided. Details of the in person session at Smith Square, London, to be shared asap.
February	Fire Bulletin 78 – February 2024	BAU	FRAs should ensure that pension contributions are deducted from carer’s leave and is included in pensionable pay when carer’s leave comes into force.	The Pensions Team will raise this with the WSCC Payroll team.
February	Fire Bulletin 78 – February 2024	BAU	Administrators should ensure that they have applied the necessary administration changes needed to correct the revaluation rates for active members of FPS 2015 that occurred in the use of provisional rather than revised increase figures for 2021 and 2022 revaluation orders. This will result in an increase of 0.2% for 2021 and 0.4% for 2022, which will need to be corrected retrospectively.	The Pensions Team will discuss with the Administration Team.
February	Fire Bulletin 78 – February 2024	McC	FRAs should note the informal guidance relating to the Age Discrimination Remedy and ensure that they are paying any corrections to pension benefits (including the applicable interest) through the pension account, paying any compensation amounts through the operating account, and keeping robust records of the recommended data separately	The Pensions Team will consider the guidance.
February	Fire Bulletin 78 – February 2024	McC	FRAs are encouraged to sign post members to the factsheet where members are hesitant to agree to re-assessment of Ill Health benefits under the Age Discrimination Remedy.	This is not applicable for WSF&RS. Required re-assessments in progress following consent.

Month	Received from/subject	Code	Summary	Actions agreed
February	Fire Bulletin 78 – February 2024	McC	FRAs are encouraged to direct members to the website and video, should members have any queries relating to Remediable Service Statements.	Information has been published on West Sussex and Administration Teams websites to date, so the additional content will be considered.
February	Fire Bulletin 78 – February 2024	Matt	FRAs to complete purchase order form for costs associated with the Matthews GAD Calculator.	Deadline of 21 March 2024 noted.
February	Fire Bulletin 78 – February 2024	McC	Scheme Management and Administration (SMA) Committee survey on Age Discrimination Remedy.	Pensions Team awaiting survey to be circulated and will work with administration team to complete by 15 March 2024.
February	Fire Bulletin 78 – February 2024	Matt McC	The Home Office has written to Chief Fire Officers and Finance Directors setting out the funding position for 2024/25, the funding support for the increase in employer contributions and a one-off grant to help with the increased administration costs due to the Sargeant and Matthews remedies.	The Administration Team are looking at exactly what they need to capture and how they will do this. This may need to evolve based on software availability. Feedback shared with the Finance Team.
February	Fire Bulletin 78 – February 2024	BAU	FRAs should note and ensure that processes are updated to reflect latest HMRC guidance relating to ‘permitted maximum’ on the pension commencement excess lump sum, reporting requirements and transitional rules.	The Pensions Team will discuss with the Administration Team.
February	Fire Bulletin 78 – February 2024	BAU	FRAs are encouraged to look at the slides relating to the tax treatment of interest relating to the Age Discrimination Remedy.	The Pensions Team attended meeting discussing tax and the Age Discrimination Remedy. The Administration Team have reflected in processes.
February	Fire Bulletin 78 – February 2024	BAU	The Finance Act 2024 received Royal Assent in February 2024. This includes the abolition of the Lifetime Allowance from 6 th April 2024.	The Pensions Team will discuss with the Administration Team.

Month	Received from/subject	Code	Summary	Actions agreed
February	Fire Bulletin 78 – February 2024	BAU	PLSA have hosted a webinar on the Abolition of Lifetime Allowance.	Noted
February	Fire Bulletin 78 – February 2024	BAU	The article covered are lump sums and lump sum death benefits, reporting requirements, overseas transfer allowance, protections and enhancement factors and transitional arrangements. FRAs should note the removal of the requirement to test against the ‘permitted maximum’ on the pension commencement excess lump sum.	The Pensions Team will discuss with the Administration Team.
February	Fire Bulletin 78 – February 2024	BAU	The guidance covers what’s changing about pension scheme returns from the 2024 to 2025 tax year, when to complete the pension scheme return, who needs to complete a 2024 to 2025 pension scheme return and what pension scheme administrators registered on the service should do now to prepared.	The Pensions Team will discuss with the Administration Team.

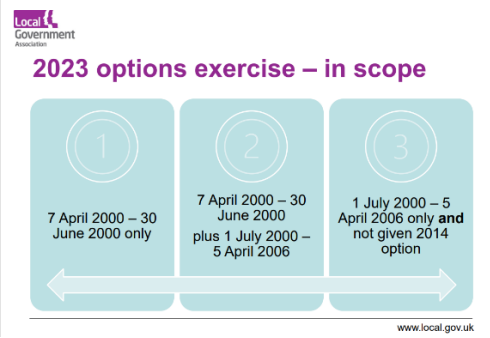
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Matthew Remedy (Options Exercise) Project

March 2024

Legislative amendments are being made to the Firefighters Pension Scheme to enable FRAs to give an option to certain retained firefighters to join the Scheme. It is expected that the legislation will come into force in October 2023 following which FRAs will be expected to commence the 2023 Options exercise as soon as is reasonably practicable, and for the exercise to run for a period of 18 months.

Milestones

Milestone / Description	Date	RAGB	Commentary
Collate in scope member identifiers	28/02/2023	Closed (Blue)	<p>Identified 586 individuals.</p>  <p>Note: The retained firefighters who were in scope for Matthew I but did not elect to take part within the deadlines, are excluded from Matthews II except if they also have service from 7 April 2000 to 30 June 2000.</p>
Advertise Matthews remedy for RDS employees to contact the FRA	31/05/2023	Closed (Blue)	All except one contact received was included as in scope members already.
Completion of address trace exercise	Ongoing	In progress (Amber)	Work required to ensure most up to date address is used to demonstrate all reasonable endeavors. The team are working through next steps on outstanding address tracing work, and any action required for letters returned undelivered following December mailing.
Send out warm up communication to in scope member using LGA template letter (future activity and background).	30/09/2023	Closed (Blue)	567 letters sent by 22 December 2023. LGA template was used with a few

Matthew Remedy (Options Exercise) Project

March 2024

			<p>clarifications around timescales and references.</p> <p>Of those not sent, 23 deceased and waiting further guidance from LGA and 3 address to be confirmed</p>
Complete of data capture to include pay / service data and ensure as far as possible that accurate data is used for calculations. Alternative is basic service data (recommended by the Home Office).	31/03/2024	In progress (Amber)	<p>There are currently four employees working on the delivery of the data capture and calculations. Information sourced from legacy systems, SAP and administration software (UPM).</p> <p>The data capture will be populated for a sample of individuals who have expressed an interest in the Matthews II exercise.</p> <p>The data capture will then be completed based on expressions of interest received.</p>
Calculation of options	31/03/2024	In progress (Red)	<p>GAD Calculator to be used but dependency on data capture.</p> <p>Resource in place with payroll team to support the calculations. Test cases to be reviewed . Date shown reflects expected first cases being completed.</p>
Options papers issued	31/03/2024	In progress (Red)	<p>Members will be provided with a Statement of service and contributions cost (using LGA template) to allow individuals to make an election. Date shown reflects expected first cases being completed.</p>
Deadline for returned options papers	30/09/2024	To be started (Grey)	<p>The indicative timetable currently six months. Date shown reflects expected first cases being completed.</p>
Collection of contributions and interest	30/04/2024	In progress (Amber)	<p>Process defined and implementation to be agreed with payroll and administration team.</p>
Member records updated and confirmation issued	31/03/2025	To be started (Grey)	<p>Hampshire Pension Services will undertake this task.</p>

Matthew Remedy (Options Exercise) Project

March 2024

Issues and risks

Key Issue or risk

Latest update on issues (including change requests) and risks related to the Work Package

1. **RESOURCING RISK:** Additional workload outside business as usual activity. Payroll fully staffed to support exercise.
2. **SCOPE RISK:** Supporting systems / tools and guidance are still being developed. Working with other FRA's to develop knowledge and consistency.
3. **DATA RISK:** Legacy records from multiple systems including microfiche. Where possible, a copy should be made to the corporate system so these can be referenced going forwards.
4. **McCloud:** A cohort of members may be impacted by the Matthews and McCloud remedy. Therefore, McCloud remedy should be delayed for these individuals until the options / decisions have been made in relation to Matthews. Administration team have identified those who cross over.

Resources and costs

Key resourcing and costs agreed / to be agreed

Resourcing in place / to be in place and estimated costs

- Payroll resource to be extended to 31 December 2024 to deliver the project
- Tracing service commissioned
- Postal charges (via recorded delivery) chargeable.
- Employer costs will not be a direct upfront cost but may cause fluctuations in future Scheme contributions.
- Employees who elect to pay to be part of the Modified Scheme, who have already reached retirement, will have interest due on the arrears of their pension payable as part of the second options exercise.
- GAD Calculator cost estimate of £50,000 plus VAT to be shared between all the Fire Authorities.

Matthew Remedy (Options Exercise) Project

March 2024

Future decisions

Key future decisions required to deliver project

Latest update on potential future decisions and when these will present

N/A

McCloud Remedy Project

March 2024

Legislative amendments are being made to the Firefighters Pension Scheme to remedy age discrimination included within previous Scheme reform. It is expected that the legislation will come into force in October 2023 following which FRAs will be expected to commence the retrospective remedy. The table below sets out those affected by the retrospective remedy.

Cohort – Immediate Choice	Number of Members
Ill-Health retirements (Immediate Choice Group 1)	9
Death Beneficiaries (Immediate Choice Group 2)	2
Active Members (Deferred Choice Group 3)	218
Deferred Members (Deferred Choice Group 4)	77
Unprotected and Tapered Protection Pensioners (Immediate Choice Group 5)	29
Protected 2006 Scheme Pensioners (Immediate Choice Group 6)	7
Protected 1992 Scheme Pensioners (Immediate Choice Group 7)	69
Total	411

Milestones

Milestones	Date	RAGB	Commentary
Active members transferred to FPS 2015	01/04/2022	Closed (Blue)	
Issue warm up letters to active members affected by Sargeant / McCloud prospective remedy	30/11/2022	Closed (Blue)	Any returned letters subject to trace and resent
Identification of cohorts	31/05/2023	Closed (Blue)	See table of affected members above.
Administrator to upload of financial and service data onto member records	30/09/2023	Closed (Blue)	The admin team have finished their review of the service and breaks data provided, for West Sussex Fire members, who qualify for Remedy – this data is now ready to be uploaded to Live system.
Issue further warm up comms / arrange workshops for members affected by Sargeant / McCloud prospective remedy.	31/12/2023	Closed (Blue)	Warm up comms sent by administration team (December 2023) to all in scope members.
Identify IQMP (Ill Health cases) and review	31/03/2024	In progress (Amber)	Nine cases identified. IQMP referral made by HR for two members. Change of IQMP since original assessments may present an issue. To be kept under review.

McCloud Remedy Project

March 2024

<p>FRA to provide service, service break and financial data for remedy period to administrator</p>	<p>31/01/2024</p>	<p>In progress (Amber)</p>	<p>Administration team have now received revised service, breaks and financial data from West Sussex FRA's payroll team.</p> <p>Additional supporting data requested from WS payroll with priority given to ill health and beneficiary cases. Provision of data to be kept under review.</p>
<p>Administrator to implement new calculations and other software updates</p>	<p>01/10/2023</p>	<p>In progress (Amber)</p>	<p>From 4 October, the administration system will allow the payment of benefits under both the 'legacy' position i.e. final salary benefits based on membership up to 31/03/2022, CARE benefits from 01/04/2022 and the 'remedy' position i.e. final salary benefits based on membership up to 31/03/2015, and CARE benefits from 01/04/2015.</p> <p>Software updates have been delayed until May 2024, requiring manual workarounds. It is expected testing will complete in early June 2024 which will allow Remedial Service Statements by the end of August 2024.</p>
<p>Immediate Choice cohort communication, calculations, and implementation by administration team</p>	<p>01/10/2023 31/03/2025</p>	<p>In progress (Amber)</p>	<p>IC-RSS work currently on hold, following instruction from the LGA.</p>
<p>Deferred Choice Remedial Service Statement issued</p>	<p>01/10/2023 01/04/2025</p>	<p>In progress (Amber)</p>	<p>There will be a need to ensure WSF&RS and the administration team are clear on the approach to contingent decisions (transfers, opt outs and additional pensions). The policy has been drafted and is being reviewed prior to approval in line with the constitution.</p>

McCloud Remedy Project

March 2024

Issues and risks

Key Issue or risk

Latest update on issues (including change requests) and risks related to the Work Package

1. **RESOURCING RISK:** Whilst the admin team have increased resources to deal with the McCloud work, the impact of member enquiries and system changes is unknown.
2. **SCOPE RISK:** Regulations and supporting systems / tools are still to be clarified and provided.

Resources and costs

Key resourcing and costs agreed / to be agreed

Resourcing in place / to be in place and estimated costs

- Payroll resource to be put in place
- Administration team resource
- Finance team for accounting adjustments and tax notifications

McCloud Remedy Project

March 2024

Future decisions

Key future decisions required to deliver project

Latest update on potential future decisions and when these will present

- Contingent Decisions
- Under and Overpayments

McCloud Remedy Project

March 2024

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Key decision: Not applicable
Unrestricted
Ref:

Report to West Sussex Fire & Rescue Service Local Pension Board

14 March 2024

Communication Strategy

Report by Chief Fire Officer (Scheme Manager)

Summary

The terms of reference for the Pension Board includes consideration of the effectiveness of communication with employers and members including the Communication Strategy as part of the Pension Advisory Board's functions.

Recommendations

- (1) The update is noted
 - (2) Feedback is provided by the Board on the FAQ relating to the Matthew remedy.
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Proposal

1 Background and context

- 1.1 The purpose of the Board is to assist West Sussex Fire and Rescue Authority in its role as a scheme manager of the Fire Fighters' Pension Scheme including to assist with improvements to customer service and assist with the development of improved administration and policies.
- 1.1 The Pensions Board's risk register recognises the uncertainty and a lack of understanding amongst members regarding the scheme which could be mitigated by developing an approach to support member communication particularly in relation to Annual Benefit Statement publication and Scheme Changes and keeping the website up to date with latest information for Pension Scheme Members.

2 Update

- 2.1 Appendix A describes the communications which has been delivered.
- 2.2 Further work is proposed to develop a communication strategy for the West Sussex Firefighters Scheme to signpost relevant information and to integrate information held locally and nationally. The intention was for this to be completed in March 2024. This has been delayed due to other work pressures within the team. In the interim

Agenda Item 7

- 2.3 Local communications are being developed to support the McCloud Remedy and Matthews Options exercise.

3 Other options considered (and reasons for not proposing)

N/A

4 Consultation, engagement and advice

N/A

5 Finance

N/A

6 Risk implications and mitigations

See background

7 Policy alignment and compliance

N/A

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Chief Fire Officer

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Appendices

Appendix A: Schedule of Communications

Background papers

Appendix A: Communication Schedule

	WSFRS' Role	Admin Team Role	Current / Future Activity	How often it should be reviewed
Annual newsletter for pensioners	Feedback on template	Draft template and sign off following WSCC feedback.	Introduction provided to the administration team for inclusion. Publication expected in early April 2024.	Annually
Annual Benefit Statements	Feedback on template	Draft templates and sign off following WSFRS feedback	The administration team are preparing templates and communications to support the 2024 Annual Benefit Statement publication.	Annually
Latest news updates (specific topics, changes to the regulations)	Sign off content when comms specific to West Sussex.	Website updates. West Sussex specific communications would be drafted, and template shared for feedback/sign off.	Monthly Correspondence Meetings continue to be held to consider relevant updates. Since the Board last met, one article has been published on the website relating to Annual Increase to Pensions (February 2024).	Ongoing
Payslips	Feedback on changes to content, when applicable.	Electronic payslips and P60's are provided as a default, unless pensioner member opts out and elects for a hardcopy.	N/A	Ongoing
Pensions Savings Statements	Feedback on template	Draft templates and sign off	N/A	Annually
Member Portal	Feedback on content/messages displayed	Maintain and update functionality / content as necessary.	Content and accessibility reviewed on an ongoing basis.	Ongoing
Requesting feedback from customers as part of the Customer Services Excellence accreditation.		HCC request from relevant parties including via email signature, and complaints/compliments reporting	Reviewed on an ongoing basis	Ongoing
Website	Review at least annually and feedback on content on as required basis.	Maintain and review content of website as necessary.	Website content and links will be kept under periodic review in line with changes.	Ongoing

