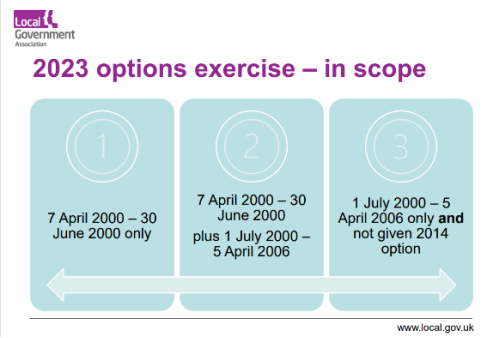


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Legislative amendments are being made to the Firefighters Pension Scheme to enable FRAs to give an option to certain retained firefighters to join the Scheme. It is expected that the legislation will come into force in October 2023 following which 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

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			<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)	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.
Deadline for returned options papers	30/09/2024	To be started (Grey)	The indicative timetable currently six months. Date shown reflects expected first cases being completed.
Collection of contributions and interest	30/04/2024	In progress (Amber)	Process defined and implementation to be agreed with payroll and administration team.
Member records updated and confirmation issued	31/03/2025	To be started (Grey)	Hampshire Pension Services will undertake this task.

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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.

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Future decisions

Key future decisions required to deliver project

Latest update on potential future decisions and when these will present

N/A