



# Monthly Report

May 2023

Warwickshire Fire Authority



**West Yorkshire Pension Fund**

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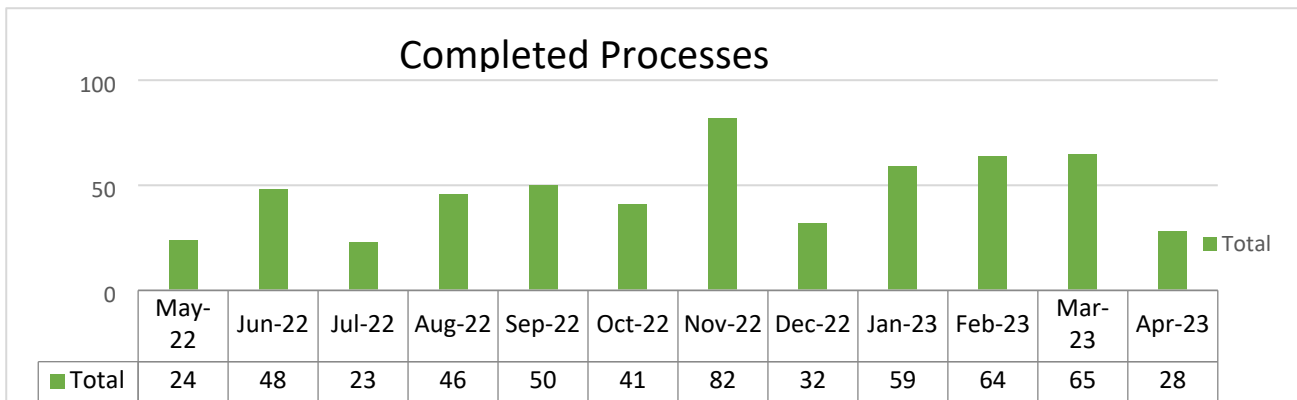


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## 1.Completed processes

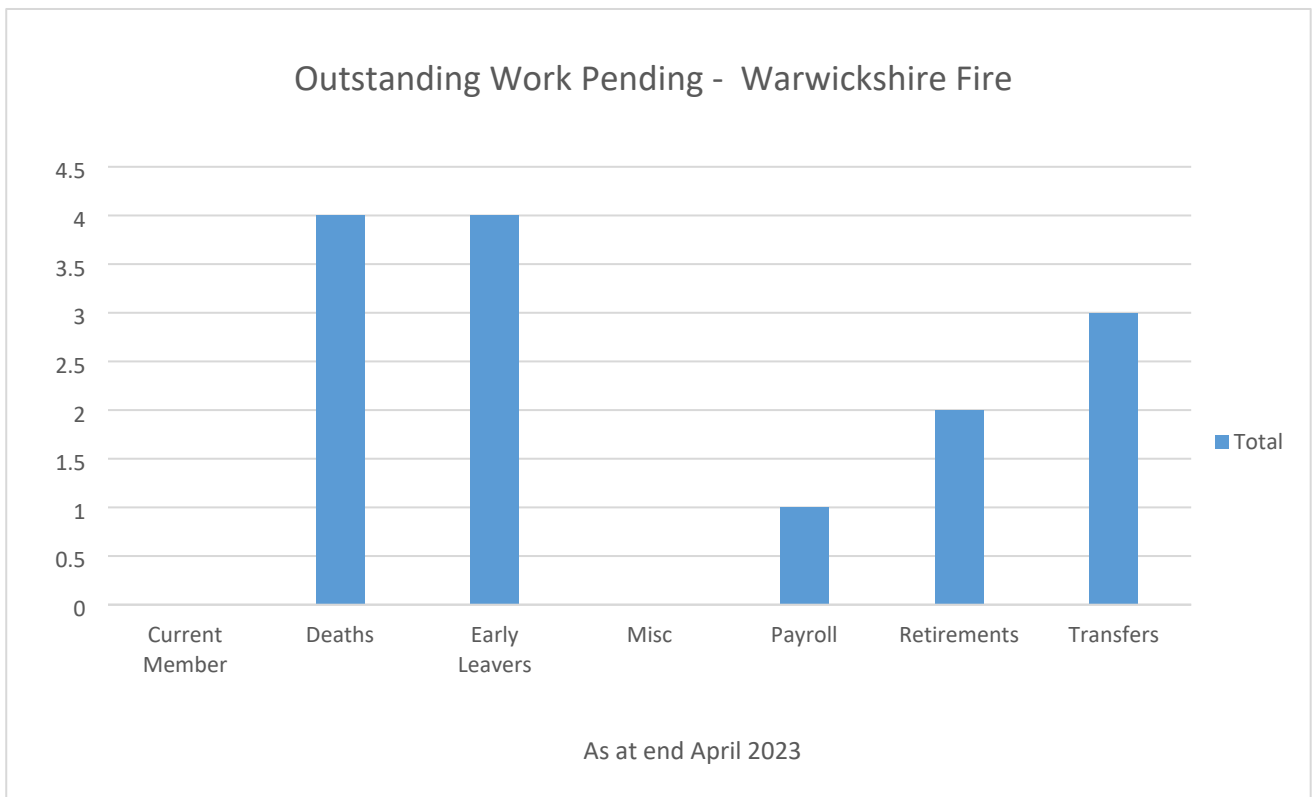
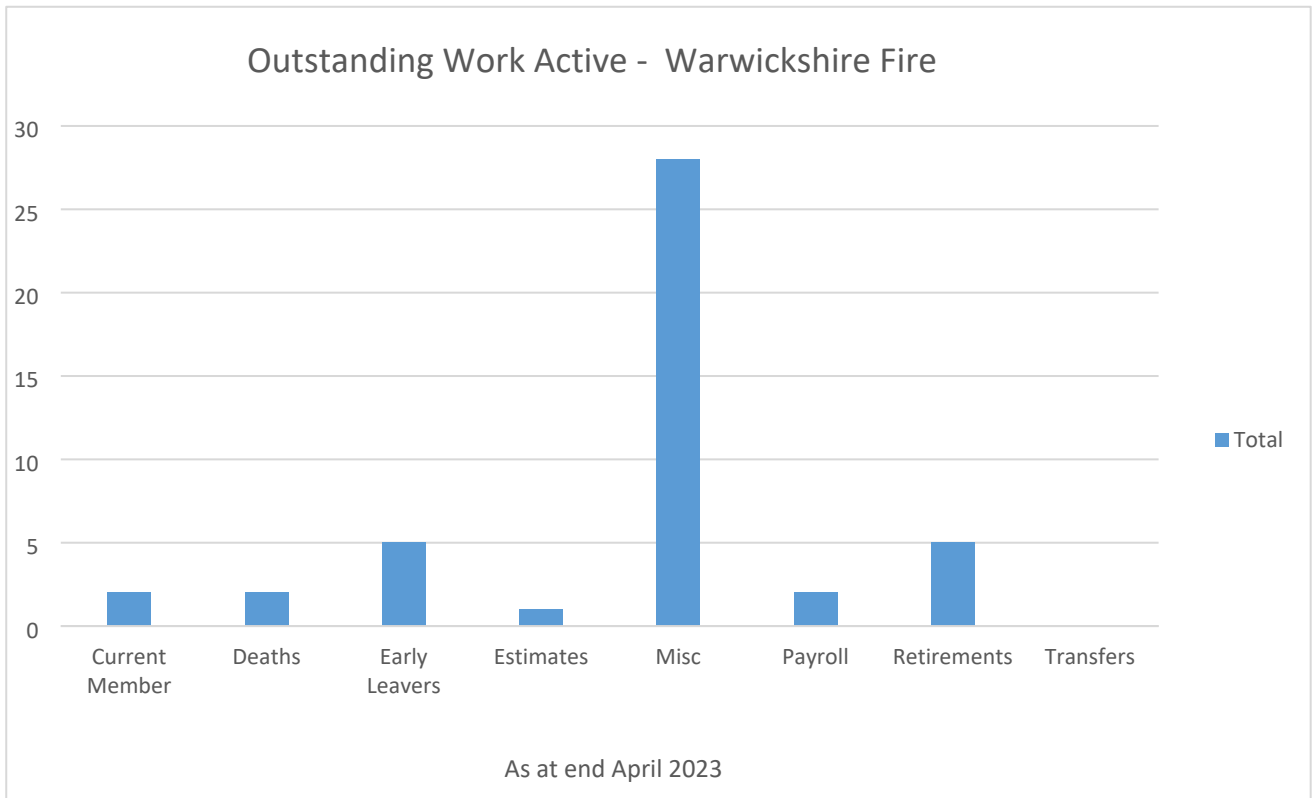
1 to 30 April 2023						
Work Type	Total Cases	Target days for each case	Target met cases	Minimum Target Met	Target met percent	Average time taken
Deferred Benefits Set Up on Leaving	2	20	2	85	100	3.5
Pension Estimate	1	10	0	90	0	36
Pension Set Up/Payment of Lump Sum	3	3	3	85	100	3
Retirement Actual	3	10	3	90	100	2.33
Change of Address	3	20	3	85	100	1.67
General Payroll Changes	9	20	9	85	100	2.56
NI adjustment to Pension at State Pension Age	1	20	1	85	100	13
Update Member Details	2	20	2	100	100	1
Injury Review	1	20	1	100	100	1
Life Certificate	3	10	2	85	66.67	6
Monthly Pension	462	Pay date	462	100	100	



Pension Estimates did not meet. This is because estimates with an intended retirement date of 3 months or more in the future are not processed until the more urgent estimates with a retirement date within 3 months have been completed

Life Certificates didn't meet due a delay in completion from the member

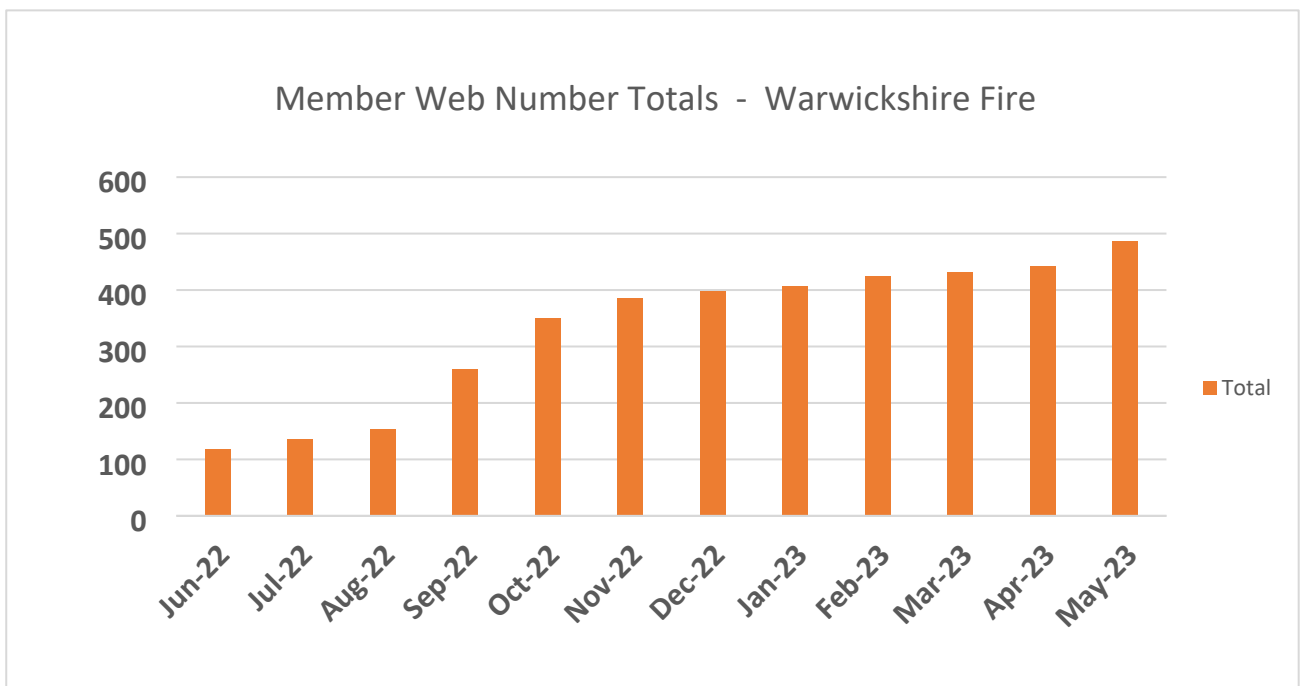
## 2. Work in Progress



### 3. Member Web Registrations

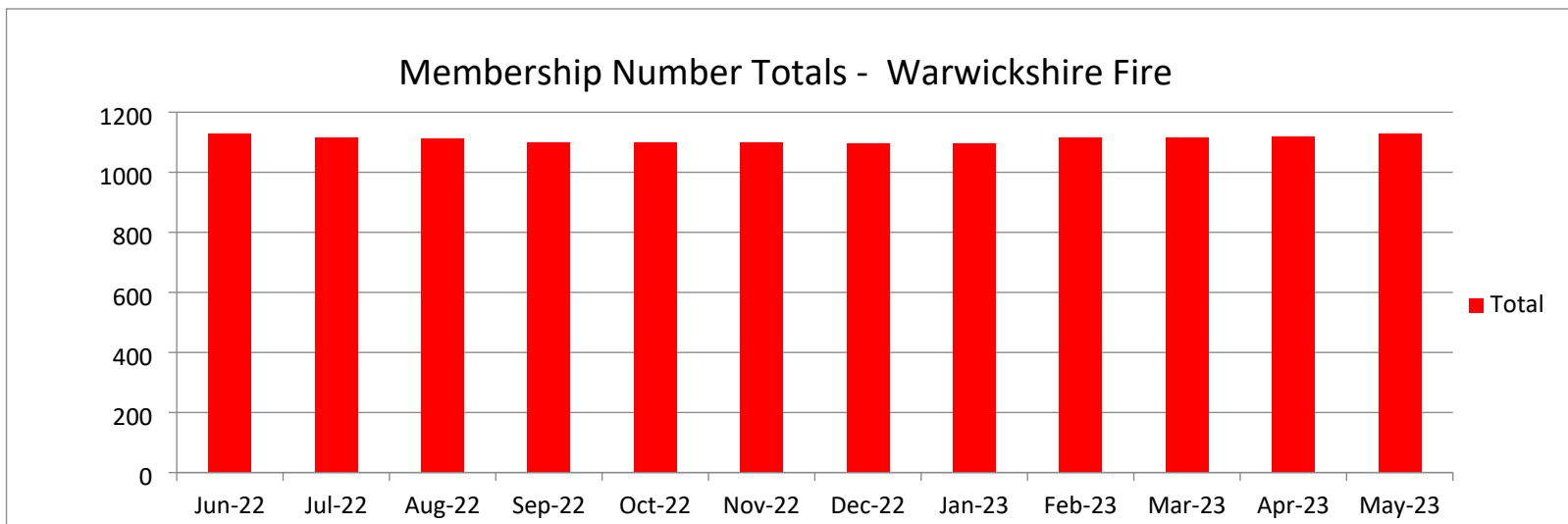
The number of members signed up to member web are:

Status	Number
Active	164
Pensioner	233
Pensioner Ex-Spouse	0
Beneficiary Pensioner	18
Deferred Ex-Spouse	0
Deferred	72

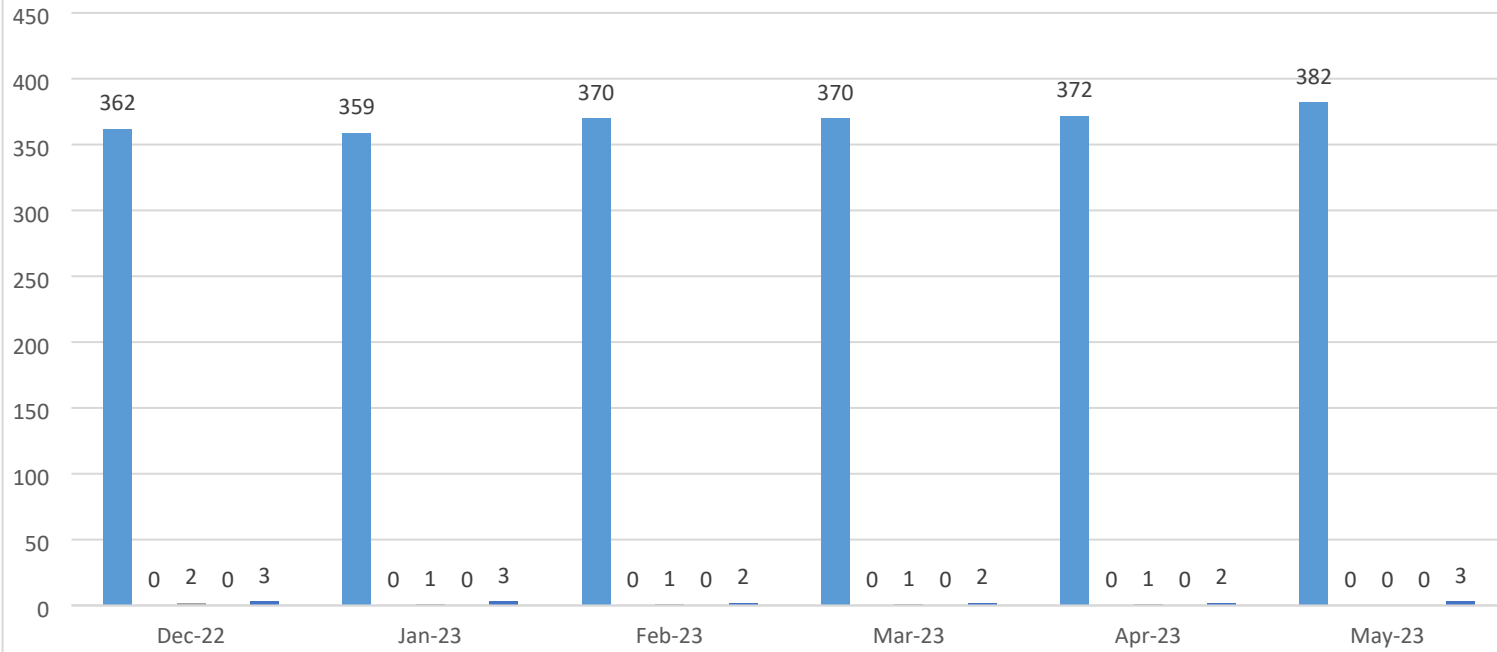


## 4.Membership Numbers

Scheme Name	Active Members	Deferred Members	Pensioners	Beneficiaries	Preserved Refund	Leavers Options Pending
Warwickshire (1992 Scheme)	0	23	356	63	0	0
Warwickshire (2006 Scheme)	0	97	4	1	2	0
Warwickshire (2006/RDS Scheme)	0	8	18	0	0	0
Warwickshire (2015 Scheme)	382	140	11	4	3	13
Warwickshire (2015/RDS Scheme)	3	1	0	0	0	0



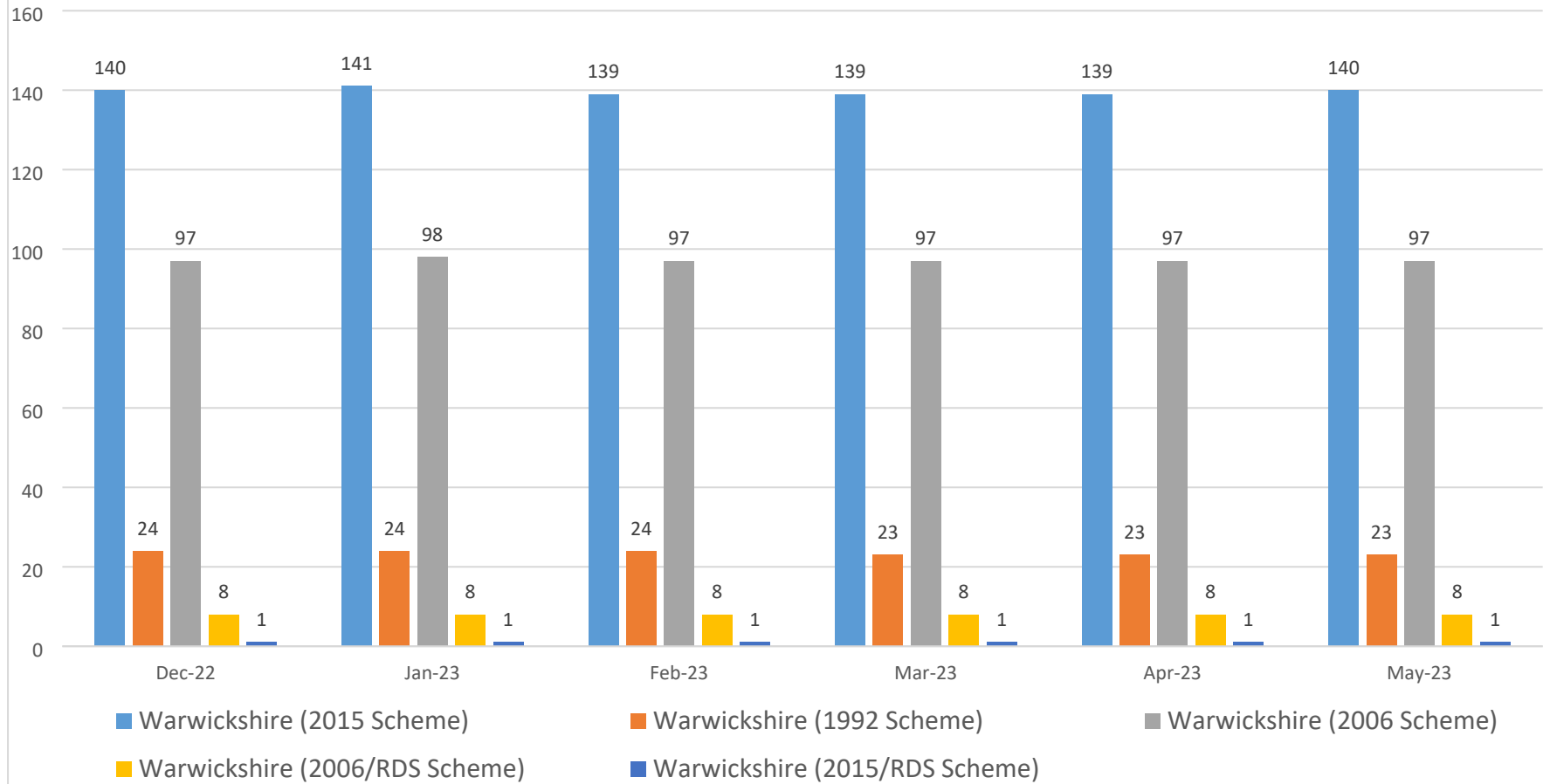
Number of Active Members by Scheme



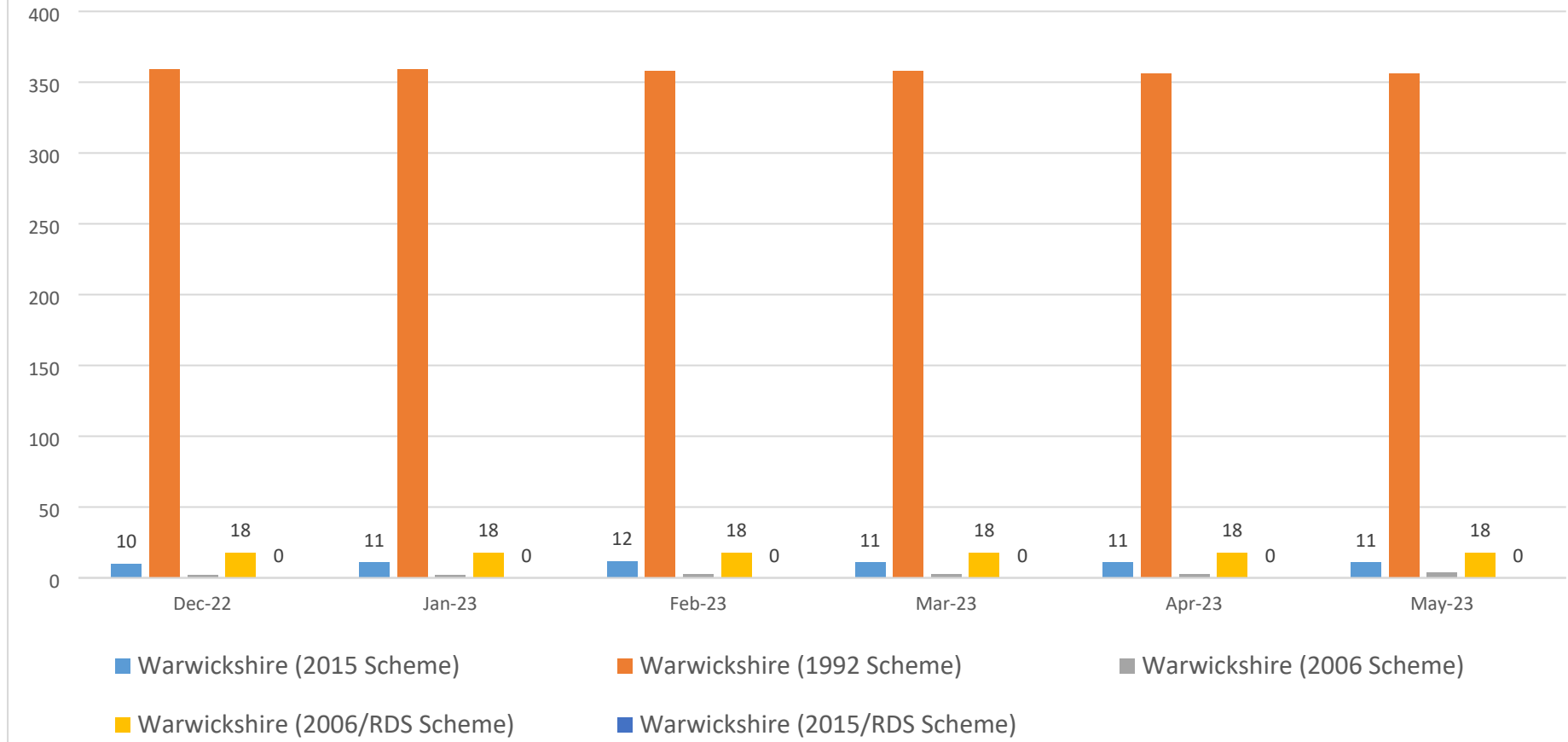
- Warwickshire (2015 Scheme)
- Warwickshire (1992 Scheme)
- Warwickshire (2006 Scheme)
- Warwickshire (2006/RDS Scheme)
- Warwickshire (2015/RDS Scheme)



Number of Deferred Members by Scheme



Number of Pensioners by Scheme



## 5. Administration Update

### SCAPE discount rate change

FRA's have already been made aware that certain work streams have been temporarily suspended following the revised SCAPE discount rate whilst we await the updated technical note.

Although LGA will inform its nominated contacts when an update has been received, WYPF will also inform all FRA's that the systems have been updated and work on these case types has resumed.

### Annual Benefit Statements

The 2023 Annual Benefit Statement template has now been finalised and is ready for production. This will commence once WYPF are in receipt of month 12 returns from all FRA's.

The 2023 ABS will reiterate that Sergeant remedy measures will not be included. Members will be able to find more details on WYPF ABS section on the website. This page includes a link to the LGA notes on annual benefit statements which will assist members in understanding their statement. The website has now been updated with the [2023 information](#) ready for production of this year's statements.

### Ongoing consultations

The May 2023 bulletin reminds all FRA's and administrators of the two consultations that are currently underway: the first is on the Firefighters' Pension Scheme (Remediable Service) Regulations 2023 – which has a deadline of 23 May 2023, and the second consultation relating to the Retained Firefighters' Pensions: Proposed changes to the Firefighters' Pension Scheme (England) 2006 – which has a deadline of 9 June 2023.

Whilst WYPF will be providing a response to both, FRA's are encouraged to also take part.

### Re-employment

The Fire Communications Working Group has agreed template wording for FRA's to include within their estimate/retirement letters to cover re-employment and abatement. This was included in the bulletin this month.

FRA's should include the wording provided in their letters to members when they receive the notice of intention to retire, or at an earlier stage with an estimate request. This ensures the individual is made aware of the impact re-employment / abatement at the earliest opportunity.

### Month 12 Postings

We remind all FRA's that month 12 postings have an extended deadline of **15<sup>th</sup> May 2023**. Please can all FRA's ensure this deadline is met, if you do have any problems or require any further details please contact [Abdul.Majid@wypf.org.uk](mailto:Abdul.Majid@wypf.org.uk)

## Lost Contact

As discussed at the FRA client meeting please can we request that WYPF are notified of any change to member addresses as soon as possible. This is particularly important as it will allow WYPF to contact as many members as possible with the initial contact letters for those who are in scope for Matthews.

## FRA Survey

At the recent client meeting we asked all FRAs to complete a short survey outlining progress with a number of items including Matthews preparation, Sargeant financial extracts and estimates.

If you have not completed the [survey](#), please do so as soon as possible

## Data breaches

None

## 6. Communication & Training

### Fact Cards

Member and FRA fact cards for 2023 are now available and online.

[Member fact card](#)

[FRA fact card](#)

### P60s

Payroll client pensioners have now been issued with their P60s, either via a bulk email with information encouraging them to download it from My Pension, or via post where the person has opted out of electronic communications

### Pension boards

- Buckinghamshire Pension Board – 5<sup>th</sup> April
- Durham & Darlington Pension Board - 12<sup>th</sup> April
- South Yorkshire Pension Board – 13<sup>th</sup> April
- East Sussex FRS Pension Board – 18<sup>th</sup> April
- Norfolk Pension Board – 25<sup>th</sup> April
- Northumberland Pension Board – 25<sup>th</sup> April
- Dorset & Wiltshire Pension Board – 27<sup>th</sup> April

### National / regional meetings

- Matthews TWG – 25<sup>th</sup> April
- McCloud PDD/TWG discussions 18<sup>th</sup> April
- Fire Comms working group – 14<sup>th</sup> April
- X Whitehall TWG – 27<sup>th</sup> April

### Client training delivered by WYPF

Pre-retirement seminars attended by WYPF during April:  
Buckinghamshire – 25 April 2023

**7. Member Update**

None

**8. IT Update**

None

## 9. Five Year Audit Plan 2019 – 2024

West Yorkshire Pension Fund Five Year Audit Plan 2019 - 2024	Frequency	Last Audit	Recommendations	Days	19/20	20/21	21/22	22/23	23/24	Total
Annual Accounts Verification	Annual	Jul 18	1	10	✓	✓	✓	✓	✓	
<b>Audits Per Year</b>					<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>5</b>
<b>Benefits</b>										
Local Government Scheme Contributions	2 Yearly	Nov 18	0	20			✓		✓	
New Pensions and Lump Sums - WYPF										
- Normal and Early Retirements	5 Yearly	Mar 15	0	25	✓					
- Death in Service, Post Retirement Widow and Dependent Benefits	5 Yearly	Mar 17	0	20			✓			
- Ill Health Pensions	5 Yearly	Oct 13	2	20					✓	
- Flexible Retirements	5 Yearly	Apr 16	1	20		✓				
- Deferred Pensions	5 Yearly	Mar 18	0	20				✓		
Transfers Out	3 Yearly	Nov 17	0	20		✓				
Transfers In	3 Yearly	Sep 16	2	20	✓		✓			
Reimbursement of Agency Payments	5 Yearly	Mar 18	2	15				✓		
Life Certificates	5 Yearly	Oct 15	0	15		✓				
AVC Arrangements	5 Yearly	Sep 17	0	15				✓		
Admission of New Bodies	5 Yearly	Jan 15	0	20	✓					
Pensioners Payroll	2.5 years	Mar 16	3	20		✓			✓	
Purchase of Additional Pension	5 Yearly	Mar 17	1	15			✓			
Annual Benefits Statements	2.5 years	Oct 16	0	20	✓			✓		
New Pensions and Lump Sums - Fire Service	3 Yearly	Jul 18	1	15		✓			✓	
<b>Audits Per Year</b>					<b>4</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>21</b>

## 10. Overriding Disclosure Time Limits

<b>Disclosure Requirement</b>	<b>Time Limit</b>	<b>Number of breaches in month</b>
Material alterations to basic scheme information	Within 3 months of the change taking effect	0
Transfer Credits (quote)	Within 2 months	0
Annual Benefit Statements	By 31 August each year	0
Annual Benefit Statement (upon request)	Within 2 months of request, if not already provided within previous 12 months	0
Deferred Benefit Statements	By 31 August each year	0
Deferred Benefit Statement (upon request)	Within 2 months of request, if not already provided within previous 12 months	0
Pension Savings Statements	By 6 October each year	0
Cash Equivalent Transfer Value Out	Within 3 months of request	0
Accessing Benefits before Normal Pension Age	2 month of benefits becoming payable	0
Accessing Benefits on or after Normal Pension Age	1 month of benefits becoming payable	0
Notification of Deferred Benefit entitlement	2 months of being notified of leaver	0

## Divorce Time limits

Type of request	Time limit	Number of breaches in month
Request for divorce information only.	3 months from receipt of the request.	0
Request for divorce information where you are notified that the information is required in connection with divorce proceedings that have already commenced.	6 weeks from receipt of the request.	0
Request for divorce information where a Court Order imposes a deadline.	Within the deadline specified by the Court.	0
Request for divorce information where you are notified that a Pension Sharing Order may be issued.	Within 21 days of receiving notification that a Pension Sharing Order may be issued or a date outside 21 days as specified by the Court.	0
Where the request is for information which does not include a Cash Equivalent Transfer Value	1 month from receipt of the request.	0
Pension Sharing Order received but some information* and/or charges are still outstanding.	A letter to both parties needs to be sent out within 21 days of receiving the Order to explain the Order cannot be implemented and request the missing information and/or charges.	0
Pension Sharing Order received including all relevant information* and charges.	A letter** must be sent to both parties within 21 days of the start of the implementation period notifying them of the deadline.	0
Pension Sharing Order Received including all relevant information and charges.	4 months to implement the Order of the date of receipt of the final information which allows calculation	0
PSO has been implemented.	A letter* must be sent to both parties within 21 days of implementing the PSO to notify both parties their entitlement.	0



## 11. Calendar of Events

January	February	March	April
Life Certificates HMRC Event Reporting Payment of Unauthorised Lump Sum and Scheme Sanction Charge to HMRC	Life Certificates Review of DWP benefits for Injury cases GAD Data Collection Spreadsheet	Life Certificates	Apply Pensions Increase Apply Care Revaluation Issue P60's Life Certificates Pensioner Newsletter
May	June	July	August
Life Certificates	Active Newsletter Life Certificates Issue Deferred Annual Benefits Statements	Life Certificates Issue Deferred Annual Benefits Statements Issue active Annual Benefits Statements	Issue active Annual Benefits Statements Life Certificates
September	October	November	December
Pension Estimates Assumption Exercise Life Certificates Pension Savings Statement	Life Certificates Participate in NFI tPR Scheme Returns	tPR Annual Survey Life Certificates	IAS19 Data capture exercise for Actuaries Life Certificates

## 12. Regulations/Fire Scheme Update

Please take a few minutes to read the Firefighters' Pension (England) Scheme Advisory Board Bulletin (Link to Bulletin below) and take any action required.

[FPS Bulletin 68 - April 2023 \(fpsregs.org\)](#)

Some key issues to highlight:

### FPS

#### Consultation on the Firefighters' Pension Schemes (Remediable Service)

##### Regulations 2023

As a reminder in [FPS Bulletin 67 – March 2023](#), we informed you that the above consultation had been launched.

The LGA will respond to the consultation and share our response before the consultation closes on 23 May 2023.

**ACTION: All interested parties are encouraged to respond to the consultation by 23 May 2023.**

#### Consultation on the retained Firefighters' Pensions: Proposed changes to the Firefighters' Pension Scheme (England) 2006

On 31 March 2023, the Home Office published [a consultation on the proposed changes to the Firefighters' Pension Scheme \(England\) 2006 in relation to retained Firefighters'](#). These regulations concentrate on providing further remedy to those individuals who were employed as retained firefighters between 7 April 2000 and 5 April 2006 inclusive providing access to the modified section of the Firefighters' Pension Scheme 2006 (referred to as 'the modified scheme').

The LGA will respond to the consultation and share our response before the consultation closes on 9 June 2023.

#### Ill Health process guide

An [ill health process guide](#) has been published to help FRAs navigate the ill health process, and understand their role, as employer and the content of the ill health certificates.

The process guide has been published under resources on the [ill health and injury](#) pages on the restricted Member Area of the Firefighters Regulations and Guidance website.

**ACTION: All interested parties are encouraged to respond to the consultation by 9 June 2023.**

#### SAB updates

##### SAB representation at Matthews Technical Working Group

In [FPS Bulletin 61-September 2022](#), we advised that a Matthews Technical Working Group had been set up to assist with the technical aspects of the implementation of the Matthews second options exercise. This group has met on a regular basis from that point with representation from the Home Office, the Government Actuary's Department, fire authorities and administrators. From April 2023, representation will include SAB members.

## **SAB website**

You can use the links below to find out about the latest updates on the work of the SAB and its committees:

- [SAB membership](#)
- [SAB meeting and agenda papers](#)
- [Committee meetings and agenda paper](#)

## **The Pensions Regulator Corporate plan 2023/24**

On 21 April 2023, TPR published its Corporate Plan for 2023/24. The plan outlines TPR's key priorities for the year. These include:

- working with the Financial Conduct Authority and DWP to develop a value for money framework
- launching the new defined benefit funding code
- laying foundations for a significant increase in addressing quality outcomes in defined contribution schemes
- increasing its attention on tackling scammers
- supporting schemes to prepare for dashboards.

The document also includes TPR's plans beyond March 2024.

See the [press release for more information](#).

## **Events**

### **Fire and Police pensions data conference – 17 May 2023**

As detailed in [FPS Bulletin 67 – March 2023](#) we are holding a data conference jointly with the National Police Chiefs Council (NFCC). The event is now fully booked; however, you can email [events@local.gov.uk](mailto:events@local.gov.uk) to put your name on the waiting list, or to request dial in details.

### **FPS AGM – London – 19 to 20 September 2023 (save the date)**

The Fire Pensions Annual Conference will take place from 19 to 20 September this year. The two-day programme will allow delegates to network with fellow colleagues and hear the latest news on the Firefighters' Pension Scheme from the scheme's key stakeholders. The full programme and booking link will be available in due course.

## Useful links

- [The Firefighters' Pensions \(England\) Scheme Advisory Board](#)
- [FPS Regulations and Guidance](#)
- [FPS Member](#)
- [Khub Firefighters Pensions Discussion Forum](#)
- [FPS1992 guidance and commentary](#)
- [The Pensions Regulator Public Service Schemes](#)
- [The Pensions Ombudsman](#)
- [HMRC Pensions Tax Manual](#)
- [LGA pensions website](#)
- [LGPS Regulations and Guidance](#)
- [LGPC Bulletins](#)