

#44

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Monday, August 16, 2021 9:06:09 AM
Last Modified: Monday, August 16, 2021 11:18:30 AM
Time Spent: 02:12:20
IP Address: 82.203.66.198

Page 1: Section 1: Current arrangements

Q1 **Cheshire Fire and Rescue Service**

Fire and Rescue Authority:

Q2 **XPS**

Who is your pension administrator:

Q3 **Third party - Private Sector body**

Is this arrangement:

Q4

Year current admin arrangement started:(Enter 4-digit year e.g. 2005 or don't know)

September 2018

Q5

Year current admin arrangement ends:(Enter 4-digit year e.g. 2005 or don't know)

August 2022

Q6 **Don't know**

Do you plan to tender at the end of your current contract:

Q7 **Respondent skipped this question**

If yes to Q6, please indicate the method of procurement:

Q8 **Centralised administration - voluntary**

Do you have a preference on future admin arrangements for the scheme:

Q9

What position within your FRA oversees delivery of pension administration:

Head of People Services - Joint Police/Fire team

Q10

Who line manages that post-holder:

Assistant Chief Officer

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Q11

Have you started work to identify data requirements for Sargeant (age discrimination):

Yes,

If yes, what are your key requirements or actions:If no, can you tell us why::

Identifying immediate detriment cases.

Q12

Have you started work to identify data requirements for Matthews (special members). The linked factsheet gives more information about the second options exercise:

No

Q13

Do you expect to need additional resource for implementation for either or both of these projects:

Yes

Q14

What position within your FRA will lead on remedy data for both cases:

Head of People Services

Q15

Which department manages ill-health retirements (IHR) for your FRA:

People Services

Q16

The HMT consultation response indicates that IHR cases may need to be reassessed against the member's opposite scheme under Sargeant remedy. Will relevant teams be sufficiently resourced to revisit IHR cases:

Yes

Q17 **Yes**

Do you have any planned resilience in place to deal with revisiting IHRs:

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Q18 **Outsourced**

Is your payroll service:

Q19 **Outsourced**

Is your pension payroll service:

Q20 **Yes**

Have you changed payroll provider or payroll system since 2015:

Q21

How many years do your payroll records go back:(Please answer in whole numbers)

10

Q22

Please detail any problems you can foresee obtaining pay data for the following:(N.B. Pay data for Sargeant will date back to 2015, pay data for Matthews could relate to as early as the 1970s)

Sargeant: **Data should be available**

Matthews: **Data may only be available on hard copy files, which may be incomplete**

Q23

For Matthews, eligible individuals will have the opportunity to buy scheme membership back to the start date of their employment. We are interested to know if you will still have access to historic employment records. How many years do your employment records go back:(Please answer in whole numbers)

20

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Q24

Which department currently manages business as usual (BAU) contribution deductions:

XPS

Q25

Which department will manage your remedy contribution adjustment process:

XPS

Q26

Yes

Will you be able to obtain/ calculate backdated contribution data:

Q27

Don't know yet

Do you expect to apply different solutions for different types of member e.g. active, deferred, pensioner:

Q28

Which department will manage adjustments to tax relief (PAYE):

XPS / in house payroll team

Q29

The HMT consultation response indicates that interest will be due on amounts paid to and from the schemes. Which department will manage the interest process:

XPS / in house payroll team

Q30

Respondent skipped this question

Please detail any issues you think might occur with adjustments of contributions:

Page 5: Section 3: Processes and impact

Q31

Yes

Are you confident that existing tax processes are robust enough to perform annual allowance recalculations for up to 7 years of remedy:

Q32

Administrator

Who undertakes Event Reporting to HMRC on scheme pays and unauthorised payments:

Q33

Yes

Does your FRA have a voluntary scheme pays (VSP) policy in place:

Page 6: Section 3: Processes and impact

Q34 **Yes**

Do you have a nominated finance lead on pensions:

Q35 **Yes**

Do you expect to need additional resource to deal with financial adjustments and impact on BAU:

Q36 **No**

Do you have an allocated budget for direct and indirect remedy costs:

Page 7: Section 3: Processes and impact

Q37 **Yes**

Do you have a nominated legal lead on pension matters:

Q38 **Yes**

If yes to Q37, is that person your "nominated contact" for the proceedings in Sargeant that are managed collectively by the LGA:

Page 8: Section 3: Processes and impact

Q39

Who leads on workforce planning and retention for your FRA:

Dedicated Group Manager & HR Business Partner

Q40 **Yes**

Is the potential impact of Sargeant remedy being modelled into plans:

Q41 **No**

Are you able to identify the cohort of members affected by Sargeant remedy:

Page 9: Section 4: Information, communication, and coordination

<p>Q42</p> <p>Following the confirmation of deferred choice underpin (DCU) in Sargeant, please indicate what information you would like members to have access to (tick as many as apply): Please note this is not a menu or guarantee of delivery. It will allow us to understand individual FRA preferences but does not guarantee delivery of any of the options.</p>	<p>Scenarios for all member cohorts across the schemes</p> <p>,</p> <p>Online tool directly linked to scheme membership data</p> <p>,</p> <p>Remedy figures for members within X years of retirement</p>
<p>Q43</p> <p>Are you currently providing information to individual members:</p>	<p>No</p>
<p>Q44</p> <p>Who do you think should provide information such as FAQs at key points in the remedy process:</p>	<p>LGA</p>
<p>Q45</p> <p>Who do you think should be the main contact for individual member enquiries:</p>	<p>FRA</p>
<p>Q46</p> <p>Who do you think should provide information to the workforce on timescales, next steps etc:</p>	<p>LGA</p>
<p>Q47</p> <p>On a scale of 1 to 10 (1 being the lowest), please indicate how well you feel your FRA communicated the first special members options exercise in 2014/2015:</p>	<p>8</p>
<p>Q48</p> <p>Do you feel that communication was reflected in the numbers of individuals choosing to become a special member:</p>	<p>Yes</p>
<p>Q49</p> <p>Please detail any suggestions for improvement for communicating the second options exercise:</p>	<p>Respondent skipped this question</p>
<p>Q50</p> <p>How best would implementation of remedy be coordinated across FRAs in England:</p>	<p>Regional collaboration</p>

Q51 **Yes**

Does your FRA have a remedy project team:

Q52 **Yes**

If yes to Q51, does this include your administrator:

Page 10: Section 5: Knowledge, capability, and capacity

Q53

On a scale of 1 to 10 (1 being the lowest), please indicate the level of internal pensions knowledge and capacity within your FRA:

☆ **3**

Q54 **Establishing new roles/ teams,**

What measures are you considering to address any shortfall in capacity (tick all that apply): **Accessing training for staff**

Q55 **Yes**

Has remedy implementation been identified as a risk on your corporate risk register:

Q56 **Yes**

If yes to Q55, has this been reported to your Local Pension Board:

Q57 **LGA on behalf of FRAs**

Who do you feel is best placed to lead on policy engagement with central government on the legislation needed to bring in age discrimination remedy:

Q58 **FRA as scheme manager**

Who do you feel is best placed to lead on direct service wide communication or provision of content for communication:

Q59 **LGA on behalf of FRAs**

Who do you feel is best placed to lead on engagement with pension administrators on implementation:

Q60

On a scale of 1 to 10 (1 being the lowest), how useful has this survey been to identify gaps in your planning:

☆

4
