

SCHEDULE

Article 2

AMENDMENT OF THE ANNEX TO THE NEW FIREFIGHTERS' PENSION SCHEME ORDER (NORTHERN IRELAND) 2007

1. In Part 1 (citation and interpretation), in article 2 (1) (interpretation)—
 - (a) in the definition of “child”, for “scheme member”, substitute “firefighter member, a deferred member or a pension member”;
 - (b) in the definition of “normal benefit age”, for “is 60” substitute “has the meaning given by article 6(2)”;
 - (c) in the definition of “normal retirement age”, for “is 65” substitute “has the meaning given by article 6(1)”.
2. In Part 2 (scheme membership, cessation and retirement), in article 4 (scheme membership)—
 - (a) In paragraph (1)—
 - (i) at the end of sub-paragraph (b)(i), add the word “and”; and
 - (ii) omit sub-paragraph (b)(iii) and the word “and” immediately preceding that sub-paragraph;
 - (b) in paragraph (5), add at the end of each of sub-paragraphs (a), (b) and (c), “, deferred member or pensioner member”;
 - (c) for paragraph (6) substitute—

“(6) For the purposes of paragraph (5), a firefighter member, deferred member or pensioner member (referred to in this paragraph as “the scheme member”) may nominate a person (a “nominated partner”) who—

 - (a) has been living with the scheme member, otherwise than as his spouse or civil partner; and
 - (b) at the date on which the question of the nominated partner’s status in relation to the scheme member falls to be considered—
 - (i) is not the spouse or civil partner of any other person,
 - (ii) is registered with the scheme administrator as the scheme member’s nominated partner,
 - (iii) is financially dependent on the scheme member, or is, with the scheme member, in a state of mutual financial dependency, and
 - (iv) is in a long-term relationship with the scheme member,but this is subject to paragraph (8).”;
 - (d) in paragraph (7), in the definition of “long-term relationship”—
 - (i) for “the period of two years”, substitute “a period of at least two years”; and
 - (ii) after “firefighter member”, insert “, deferred member or pensioner members”;
 - (e) in paragraph (8), after “firefighter member”, insert “, deferred member or pensioner member”;
3. In Part 2 (scheme membership, cessation and retirement)—
 - (a) in article 5 (eligibility conditions), in paragraph (1), for sub-paragraph (b) substitute—

“(b) such transfer payment has been made to the Scheme in respect of his personal pension rights under a personal pension scheme as qualifies him for benefits under the Scheme; or”;

and
 - (b) in article 8 (election not to make pension contributions), after paragraph (1) insert—

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“(1A) A contributions election may not be made solely in respect of contributions relevant to additional pension benefit under article 17B of Part 3 (additional pension benefit: continual professional development).”

4. In Part 3 (personal awards)—

(a) In article 12 (award on ill-health retirement)—

- (i) in paragraph (3), after “calculated”, “insert subject to paragraph (4),”; and
- (ii) after paragraph (3), add—

“(4) The amount of the higher tier ill-health pension of a firefighter member who, by virtue of article 17, is entitled to two pensions, is whichever is the greater of—

- (a) the sum of his lower tier ill-health pension (calculated in accordance with paragraph 1 of Schedule 1) and the higher tier ill-health pension to which he would be entitled if paragraph (3) were not subject to this paragraph (calculated in accordance with paragraph 2 or 3 of Schedule 1); and
- (b) the amount of the single pension to which he would be entitled under paragraph (7) of article 17.

and for the purposes of this paragraph it shall be assumed that the person had given the written notice referred to in paragraph (6) of article 17.”.

- (b) in article 14 (cancellation of deferred pension), in paragraph (2), for “the service” substitute “the Board’s employment”;
- (c) in article 15 (pension on member-initiated early retirement), in paragraph (5)(a), for “pensionable”, in the second place in which that word appears, substitute “reference”;
- (d) in article 16 (pension on Board-initiated early retirement), in paragraph (1), for “the service” substitute “the Board’s employment”;
- (e) in article 17 (entitlement to two pensions)—
 - (i) in paragraph (1), for “paragraph (7)” substitute “paragraph (6)”; and
 - (ii) in paragraph (4), for “that day”, substitute “the last day of his membership of the Scheme”;
- (f) after article 17 insert—

“Additional pension benefit: long service

17A.—(1) A firefighter member who—

- (a) in respect of a period that includes 30th June 2007 is entitled to a long service increment or an interim or transitional payment connected with long service, and
- (b) on or after 1st October 2007—
 - (i) retires from employment as a regular firefighter, or
 - (ii) becomes entitled to a deferred pension under article 13,
 shall be credited with an amount of additional pension benefit.

(2) Subject to paragraph (3) and article 17C(5), the amount of additional pension benefit is that found by applying the formula—

$$\frac{A + (B \times 2)}{60} \times \pounds 990$$

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where—

A is the number in years (counting part of a year as the appropriate fraction) by which the member's pensionable service up to and including 30th June 2007 exceeds 15 but does not exceed 20; and

B is the number in years (counting part of a year as the appropriate fraction) by which his pensionable service exceeds 20 but does not exceed 30.

(3) Where the Retail Prices Index for the month of September preceding the relevant tax year is higher than it was for September 2007, the amount of additional pension benefit (as calculated in accordance with paragraph (2) and, if applicable, this paragraph) shall be increased by the same percentage as the percentage increase in the Retail Prices Index.

(4) Any increase in accordance with paragraph (3) shall be applied with effect from the first Monday of the relevant tax year.

(5) In paragraph (3)—

“relevant tax year” means a tax year in relation to which—

- (a) the amount of a firefighter member's pension benefits is calculated for the purposes of this Scheme; and
- (b) he is not a pensioner member or a deferred member; and “tax year” means the period of 12 months beginning with 6th April.

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Additional pension benefit: continual profession development

17B.—(1) A firefighter member who, in any CPD year beginning with the year commencing on 1st July 2007, receives CPD payments, shall be credited with an amount of additional pension benefit in respect of that year.

(2) Subject to paragraph (3) and article 17C(5), the amount of additional pension benefit in respect of a CPD year shall be determined on 1st July immediately following the year in question in accordance with guidance and tables provided by the Scheme Actuary.

(3) Where the Retail Price Index for the month of September preceding the relevant tax year is higher than it was for the month of September in the CPD year in question, the amount of additional pension benefit for that CPD year (as calculated in accordance with paragraph (2)) shall be increased by the same percentage as the percentage increase in the Retail Prices Index.

(4) Any increase in accordance with paragraph (3) shall be applied with effect from the first Monday of the relevant tax year.

(5) In this article—

“CPD payments”, as regards a firefighter, means payments made to him by the Board in respect of his continual professional development;

“CPD year” means a period of 12 months beginning with 1st July in which a firefighter member is in receipt of CPD Payments;

“relevant tax year” means a tax year in relation to which—

- (a) the amount of a firefighter member's pension benefits is calculated for the purposes of this Scheme, and

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- (b) he is not a pensioner member or a deferred member;
and a tax year is a relevant tax year in relation to a particular CPD year if it is the tax year in which CPD payments for that CPD year are taken into account; and

“tax year” means the period of 12 months beginning with 6th April.

Additional pension benefit: supplementary provisions

17C.—(1) Subject to paragraphs (2) to (4), additional pension benefit under article 17A or 17B is payable at normal retirement age.

(2) Where the firefighter member resigns or is dismissed or makes a contributions election, additional pension benefit is payable at normal benefit age; and paragraphs (4) to (6) of article 13 (deferred pension) shall apply in relation to that benefit as if it were a deferred pension to which he was entitled under that article.

(3) Where the firefighter member leaves his employment on ill-health retirement, his additional pension benefit is payable immediately.

(4) Where the firefighter member takes Board-initiated early retirement or member initiated early retirement, his additional pension benefit is payable at the same time as his pension under article 15 (pension on member-initiated early retirement), or, as the case may be, article 16 (pension on Board-initiated early retirement).

(5) Where paragraph (4) applies, the firefighter member’s additional pension benefit shall be actuarially reduced by applying to the amount ascertained in accordance with article 17A or 17B (as the case may be) the appropriate actuarial reduction factor notified by the Scheme Actuary.

(6) For the purposes of articles 19 and 20 (commutation), additional pension benefit shall be treated as if it were a pension payable under this Part.

(7) For the purposes of determining the amount of any survivor’s pension under Part 4 or pension credit under Part 6, additional pension benefit shall be treated as if it were a pension payable under this Part.”;

(g) in article 18 (refund or aggregate pension contributions), in paragraph (1)(b), for “that employment” substitute “Board’s employment”;

(h) in article 19 (commutation: general provision)—

(i) after paragraph (8) insert—

“(8A) Paragraph (8B) applies where—

(a) notice of commutation has taken effect in relation to—

(i) a person’s ill-health pension, and

(ii) the entitlement to pension ceases under article 50(3) (Consequences of review); or

(b) notice of commutation has taken effect in relation to—

(i) a person’s deferred pension that has been paid before normal benefit age (“the early-paid pension”), and

(ii) the entitlement to early-paid pension ceases under article 50(5) (Consequences of review).

(8B) If the person becomes entitled to another pension, other than an injury pension under the Compensation Scheme, for which he is entitled to reckon the period of pensionable service that was reckonable for the purposes of the ill-health pension or the early-paid pension (as the case may be), the other pension shall be reduced by the amount by which the ill-health pension or the early-paid pension would have been reduced if it had not been withdrawn.

(8C) Where paragraph (8B) applies, and notice of commutation is given in respect of the other pension, the portion of it that may be commuted is reduced by the amount of the reduction under that paragraph.”; and

(ii) in paragraph (9)(b), for the words from “Part 7” to the end, substitute “Part 7A of the Compensation Scheme in an award to a reservist.⁽¹⁾”;

(i) in article 21 (allocation of pension), in paragraph (4), for “Part 7 of the Compensation Scheme (awards to, or on death of, servicemen)”, substitute “Part 7A of the Compensation Scheme (awards to, or on death of, reservists)”.

5. In Part 5 (awards on death)—

(a) In article 35 (death grant)—

(i) in paragraph (4), after “part-time”, insert “retained or volunteer”;

(ii) in paragraph (8), for sub-paragraph (b), substitute—

“(b) dies without having paid in full the contributions due to the Board under that article,”;

(iii) in paragraph (9) after “amount”, insert “or, where there has been partial payment, the balance”; and

(b) in article 36 (post retirement death grant), in paragraph (1)—

(i) in paragraph (i)(b) after “period”, insert “(excluding any lump sum that he may have received on commutation under article 19 of Part 3)”; and

(ii) in paragraph (ii)(b), for “including”, substitute “excluding” and omit “or 20”.

6. In Part 6 (pension sharing on divorce)—

(a) In article 39 (commutation of part of pension credit benefits), for paragraph (2), substitute—

“(2) The commuted portion must not exceed one quarter of the amount of the pension.”;

(b) in article 41 (post-retirement death grant: pension credit members), in paragraph (1)(b), for paragraph (ii), substitute—

“(ii) the instalments of pension that have been paid,”; and

(c) after article 41 add—

“Death grants where pension credit member dies before pension credit benefits payable

41A.—(1) If a pension credit member dies before any benefit deriving from the member’s pension have become payable to him under this Scheme, a lump sum death grant is to be paid to his personal representatives.

(1) Part 7A was inserted by S.R. 2008 No. 238, Schedule, para 8.

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(2) The amount of the grant shall be equal to the product of 2.25 and the annual rate of the pension to which the member would have been entitled under article 37(2).”.

7. In Part 7 (reservists)—

(a) in article 43 (continuity or employment)—

(i) in paragraph (2), for “pensionable”, substitute “additional”;

(ii) for paragraph (3) substitute—

“(3) For the purposes of calculating the amount of a reservist’s pension contributions under article 63—

(a) where he was a regular firefighter immediately before the forces period in question the pay that he would have received from the Board during his forces period shall be taken to be his pay for that period (his “notional regular pay”); and

(b) where he was a retained or volunteer firefighter immediately before the forces period in question, the amount determined by multiplying the average of his pensionable pay for the period of 12 months that immediately preceded his forces period (expressed as a daily rate) by the number of days in his forces period shall be taken to be his pay for that period (his “notional retained or volunteer pay”),

but this is subject to paragraph (4).

(4) In respect of any period during a reservist’s forces period in which the aggregate of—

(a) his actual pay, and

(b) any payments that he receives under section 4 of the 1996 Act,

is less than his notional regular pay or, as the case may be, his notional retained or volunteer pay for that first-mentioned period, he shall be treated as having no pensionable pay (and, accordingly, no liability to make pension contributions).⁽²⁾

(b) in article 44 (awards on death or permanent disablement), for paragraph (2) substitute—

“(2) Where a reservist dies—

(a) during his forces period; or

(b) while receiving a pension under paragraph (1),

an award shall be payable in accordance with paragraphs (3) and (4).”.

8. In Part 10 (qualifying service and pensionable service)—

(a) in article 56 (reckoning of pensionable service)—

(i) in paragraph (1)(d), for “an”, substitute “a lower tier” and omit “, other than any period included by way of enhancement,”; and

(ii) in paragraph (6)(b), after “under”, insert “article 35 of”; and

(b) in article 58 (reckoning of unpaid period of absence)—

(i) in paragraph (1), for “Part 11”, substitute “Parts 11 and 13”; and

(ii) in paragraph (2), for “unpaid leave”, substitute “absence without pay”.

9. In Part 11 (pensionable pay, pension contributions and purchase of additional service)—

⁽²⁾ See, as to pension payments, regulation 5 of the Reserve Forces (Call-out and Recall) (Financial Assistance) Regulations 2005 (S.I. 2005/859).

- (a) in article 61 (pensionable pay)—
 - (i) in paragraph (1), for the words from “other than” to the end of sub-paragraph (a), substitute “except any allowance or emoluments paid to him on a temporary basis, other than payments in respect of his continual professional development (see article 17B), and”; and
 - (ii) in paragraph (5), for “December” (in both places), substitute “September”;
- (b) in article 62 (final pensionable pay)—
 - (i) after paragraph (1) insert—

“(1A) Where the pensionable pay received by a firefighter in respect of the 365 pensionable pay days referred to in paragraph (1) includes an amount in respect of his continual professional development (see article 17B), that amount shall be disregarded for the purpose of ascertaining his final pensionable pay.”;
 - (ii) in paragraph (2)(a)(i), omit the words “(before changing roles and accepting a reduction in pensionable pay)”;
 - (iii) after paragraph (5) insert—

“(5A) The final pensionable pay of a firefighter member who—

 - (a) Is entitled to a long service increment; and
 - (b) Retires after 30th September 2006 and before 1st October 2007, or becomes entitled to a deferred pension under article 13 within that period,

shall be calculated—

 - (i) As if his long service increment had accrued at the rate of £990 per annum (disregarding the reduction that had effect in relation to times on and after 1st October 2006), and
 - (ii) disregarding any LS-related payment.

(5B) The final pensionable pay of a firefighter member who—

 - (a) retires or becomes entitled to a deferred pension on or after 1st October 2007, and
 - (b) is entitled to additional pension benefit under article 17A (additional pensions benefit: long service),

shall be calculated taking into account whichever of the following paragraphs yields the greater amount—

 - (i) the calculation is made with regard to his long service increment and any LS-related payment, or
 - (ii) the calculation is made with regard to his long service increment and any LS-related payment, but without regard to the amount credited to him under Article 17A.

(5C) In paragraphs (5A) and (5B) “LS-related payment” means an interim or transitional payment connected with a firefighter member’s long service.”;
 - (iv) for paragraph (6) substitute—

“(6) The final pensionable pay of a retained or volunteer firefighter shall be determined by reference to the final pensionable pay of a regular firefighter employed in a similar role and with equivalent qualifying service.”; and
 - (v) after paragraph (7) add—

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“(8) In paragraph (6) “role” in relation to a firefighter, means the role in which he is for the time being employed, being a role set out in “the Fire and Rescue Services Rolemaps” issued by the National Joint Council for Local Authority Fire and Rescue Services in August 2005.(3).”

(c) in article 69 (periodical contributions in respect of unpaid service or absence), in paragraph (1)(a), for “article 68(1)” substitute “article 67(1)”.

10. In Part 12 (transfers into and out of the Scheme)—

(a) in article 74 (applications for transfer value payments), in paragraph (6)(a)—

(i) for “eligible”, substitute “, or is entitled”; and

(b) in article 79 (procedure for applications under article 78), in paragraph (2)(a), omit “, or such longer period as the Board may allow”;

(c) in article 80 (acceptance of transfer value payments), in paragraph (3), omit sub-paragraph (a).

11. In Part 13 (Firefighters’ Pension Fund)—

(a) in article 86 (Payments and transfers into Firefighters’ Pension Fund), for paragraph (5) substitute—

“(5) In respect of each firefighter employed by the Board who retires with an entitlement to immediate payment of a lower tier ill-health pension under article 12, the Board shall transfer into the FPF such amount as shall be determined and notified to it by the Department as the lower tier ill-health charge applicable in respect of that pension.”; and

(b) in article 87 (transfers from Firefighters; Pension Fund), for paragraphs (4) and (5), substitute—

“(4) Where a person’s entitlement to higher tier ill-health pension or a lower tier ill-health pension has wholly and permanently ceased under any provision of Part 9, paragraph (4) or (5) of article 50 (as the case may be) shall be disregarded in his case (to the extent that it remain to be compiled with); and the Board shall transfer from the FPF to any other fund maintained by it an amount equal to the aggregate of the instalments that have been transferred to the FPF in respect of the pension entitlement to which has ceased.”.

12. In Schedule 1 (ill health pensions), in paragraph 1—

(a) In sub-paragraph (2)—

(i) after “person”, insert “who is a retained or volunteer firefighter”; and

(ii) after “by his”, insert “final”; and

(b) in sub-paragraph (3)(b), after “retained”, insert “or volunteer”.