

FUND COMMITTEE

5 June 2026

ADMINISTRATION REPORT

Report by Deputy Chief Executive (Section 151 Officer)

RECOMMENDATION

1. The Committee is **RECOMMENDED** to note the report.

Executive Summary

2. This report updates the Committee on the key administration topics including service performance, statutory compliance, staffing, debt recovery and write offs in the last quarter.

Service Performance

Benefit Administration

3. Annex 1 shows the case volumes (number of carried over, new, completed and outstanding cases) during the period January to March 2026. There were 9,827 cases to complete (1,600 carry forward plus 8,227 new cases).
4. The team completed 78.2% of the work, a decrease of 1.5% from the previous quarter. There were 2,288 cases to carry forward, a reduction of 1,012 cases from the previous quarter.
5. Since mid-February 2026, some team members have been working overtime on a batch of backlog leavers. The number started at 1,092 and has decreased to 294 outstanding as of writing this report. The deadline for completion is end of May 2026. This work has contributed to the reduction of the carry forward figure.
6. Annex 2 shows the Key Performance Indicator (KPI) performance measure of the work completed by the benefit administration team in the last quarter, January to March 2026. The team completed 7,539 cases, of which 92.9% were completed within Service Level Agreement (SLA), an increase of 13.5% from the previous quarter.
7. The team have worked hard to prioritise pension payments, which is evident in the statistics. The two new members of the team have been working on newer leavers, which has also contributed to the increase within customer target score.

8. Annex 3 shows a comparison of case volumes and completed cases from April 2025 to March 2026. The visual illustrates the increase in the number of new cases. The main areas identified are member enquiries which have tripled, and retirements from deferred status doubled in the last year.
9. The data also indicates a rise in completed tasks following the appointment of the two agency administrators in quarter 3 and staff carrying out overtime on backlog work.
10. Annex 4 contains the telephone statistics for the period January to March 2026. The team received 3,532 calls an increase of 582 from the previous quarter. The main contributing factor to the increase is calls relates to the introduction of the new member self-service portal, in January 2026.
11. Annex 5 compares telephone statistics from April 2025 to March 2026, showing most calls occurred in the last quarter. The team answered 94.48% of calls, up 0.65% from the previous quarter.
12. In the last quarter, 4,078 e-mails were received to the main pension service inbox. 1,475 related to member enquiries, of which 32% relate to retirement queries followed by 30% being general enquiries.
13. Efforts are underway to route member enquiries through the member self-service portal and a contact form available on the new website, with plans to phase out direct email for queries. This change aims to reduce the frequent duplication of queries through multiple contact methods, as the team report that, on average, at least two tasks are created are created for every enquiry.
14. Statistics indicate that member enquiries require dedicated resources to meet the increasing demand and improve response times. The team is frequently pursued for information within existing timelines, even when expectations are managed through communication.

Pension Scams

15. During the last quarter, January to March 2026, there were no pension scams reported. The team continue to follow process and carry out vigilant checks to mitigate the risk of scams.

Statutory Returns

16. There were no statutory returns made in the last quarter January to March 2026.

Fire Service Administration

17. Annex 6 shows the Firefighter Scheme administration statistics for the last quarter January to March 2026. The team completed 105 cases of which

78.10% were completed within SLA deadline, a decrease of 4.83% from the previous quarter.

18. Ongoing training, resource and the complexity of the work in respect of the Remedy and Second Options projects means that some cases are still not being completed within the SLA deadlines, but this is being reviewed and progress will be made.

Employer Monthly Returns

19. In the last quarter January to March 2026, the team verified 96.61% of the monthly data returns within service level agreement (SLA). There were 3.39% of the monthly returns outstanding to carry forward due to on-going queries.
20. The team completed 859 cases created from data errors, of which 84.40% was completed within the SLA deadline, a decrease of 2.2% from the last quarter.
21. The work on improving the reporting in this area was scheduled to be completed on 31 March 2026, however, this has been extended due to some queries on the data in the reports. The team are working to resolve and finalise the remaining queries and an update will be provided at the next meeting.
22. In the last quarter, to 31 March 2026 there were:
 - 5 new admissions
 - 1 academy conversions
 - 1 closure valuations
 - 4 TUPE

End of Year

23. At the time of writing this report, end-of-year checks are complete for 21 employers, allowing Annual Benefit Statements to be issued to 105 scheme members. The team are processing the remaining 134 employers, with no issues reported and expects to meet the 31 August 2026 deadline.

Member Self Service

24. The team transitioned to the new member self-service platform, Engage, on 27 January 2026. As of the date of this report, 6,983 members have registered, representing 9% of the scheme's total membership.
25. At present, inconsistencies have been identified in the statistical reports, and these are currently being discussed with the system provider. Efforts will be made to address this issue, and comprehensive statistics will be presented at the next meeting.

26. Communication is being issued to target specific membership groups to encourage sign up, and it is expected registered members will increase by the next meeting.

Financial Implications

Transfers

27. In the last quarter January to March 2026, £5.78 million was transferred into the fund and £2.1 million was transferred out of the fund, of which £817k related to payments made to non-Local Government Authorities.
28. The table below provides a breakdown of the values and numbers of transfers out payments made to non-Local Authorities in the last quarter January to March 2026.

Value	Number of payments made	Total Amount Transferred
Under £10k	9	£48,621.85
£10k to £25k	5	£75,522.37
£25k to £50k	1	£29,737.44
£50k to £100k	0	£0
£100k to £250k	0	£0
Over £250k	2	£663,633.81

29. There were two payments over £250k paid to an overseas superannuation scheme and a SIPP scheme. Due diligence checks were carried out, and the team were happy that no red or amber flags were present to prevent proceeding with payment.

Invoices Outstanding

30. At 31 March 2026, there were two invoices outstanding amounting to £3,128.70, both of which are with the income recovery team.

Employer Contribution Monitoring

31. In the quarter January to March 2026, 1 payment was made past the statutory deadline of 22nd of the month following payroll. This relates to a small employer affecting 1 member. This employer will be monitored and escalated if required in line with the administration strategy.

Complaints

32. The table below shows number of complaints over the last two years measured from January to December and the last quarter January to March 2026 of the current year.

Year	Informal	Resolved	IDRP Stage 1	Upheld	IDRP Stage 2	Upheld	TPO
2024/25	27	24	4	2	1	0	1
2025/26	19	12	10	5	1	0	1
2026/27	9	8	6	1	1	0	0

33. In 2025/26, five IDRP stage 1 complaints were upheld: one about Fire administration, one ill health appeal, and three regarding Pension Services processes. Relevant processes have been updated to enhance customer service and reduce future complaints.

Pension Dashboard Project

34. Annex 7 confirms the current position of Pension Dashboard project plan.
35. The connection for our AVC providers is in progress and currently sat with our system software provider, to create pathways to allow the data to be transferred to the pension system.
36. The fund has established a connection to the Dashboard and data has been submitted. The date for the official launch of the dashboard has not yet been determined, and the dashboards are currently being user tested via selected users only.
37. The software upgrade has now been completed to enable the team to test the upload of individual AVC fund information so that this data can be submitted to the Dashboard.
38. The go live plan and go live execution section of the project will commence when further information is available on the go live date.

Data Quality

39. The data quality scores remain unchanged since the last meeting. The scores remain common data 94.6% and scheme specific data 99.13%.
40. The team are currently testing the implementation of a new data cleanse functionality within our software system that will provide missing address data for addresses held in the UK, which will improve the common data score. Updates will be reported to future meetings.

McCloud Project

41. Annex 8 confirms the position of the McCloud Project, following the application to extend the deadline to complete the project by 31 August 2026.
42. Considerable progress was achieved in the last quarter, with all but three areas of work left to cover to complete the project of existing cases. It should be noted that there will be further cases identified going forward, which will be part of the day-to-day work.
43. The two amber areas on the RAG status indicate caution, as there is three months before the statutory deadline remaining and the tasks ahead, such as recalculating pensions and pension debits, are complex. Resources are available to handle these cases and the project to continues to be monitored to ensure timely completion.
44. Annex 9 provides confirmation of the McCloud results so far, detailing how many cases have been reviewed to determine their eligibility, the number of members who fall within scope, and among those, who were impacted by the McCloud remedy and are owed payments.
45. To date, fewer than 4% of scheme members have been affected by the McCloud remedy. For active members, impact is estimated only; final determination occurs when benefits are calculated upon leaving.
46. The work on this project has taken an average of around 4 FTE staff over the last two years. A final report will be presented at the next meeting.

Pension Software Development

47. In April 2026, a project was completed that transitioned pension payslips from formal postal delivery to electronic uploading on the My Oxfordshire Pension portal, unless the pensioner member has actively chosen to opt out of online communication.
48. Postage was reduced from 22,610 to 6,776 payslips, saving around £19,000. With similar numbers expected in May, the total cost saving is projected at £38,000.
49. The upcoming project developments are data cleansing (address and mortality tracing) and enhanced admin-to-pay, which links benefit administration to payroll for greater efficiency with less manual intervention. Updates on the progress of this work will be shared at the next meeting.

Age Discrimination Remedy – Fire Service

- 50. At 31 March 2026, there were 4 active and 1 deferred statement outstanding. One was awaiting additional pay data which has now been received, and four have pension rights with another body or FRA.
- 51. 34 pensioner cases remain – 18 of these are immediate detriment cases where we are waiting guidance on how to review. 16 are existing pensioners who will be contacted by 31 May 2026.
- 52. The OFRS Pension Remedy working group is overseeing progress of this project.

On-call Second Options Exercise – Fire Service

- 53. So far, 290 Forms requesting more information have been received and acknowledged, with updates provided regularly. 9 members have declined further information.
- 54. Quotes are currently being issued and are being sent in cohort order, with those with an immediate entitlement to pension benefits being sent first.
- 55. Pension payments are in progress; 85 statements have been issued, and 60 pensioners have received benefits totalling £3.2 million gross so far.
- 56. The deadline for completing the work has been extended to 31 March 2027, following a consultation and proposed regulatory amendments now before Parliament.
- 57. Following the receipt of the amending legislation, it is necessary to review all eligible cases and, where appropriate, issue updated quotations to facilitate the linking of existing deferred records. Additionally, contact will need to be made with the relatives of deceased members if the amended legislation permits a payment.
- 58. The team are currently awaiting an updated GAD calculator, which will enable the determination of these payments; it is anticipated to be available by the end of June.
- 59. 202 statements remain to be issued. We will continue to prioritise the Cohort 1 and 2 cases to ensure statements are sent as soon as possible, and quotes for the Cohort 3 members will follow. If any cohort 3 members are active firefighters and are indicating that they will be retiring, these quotes are also being prioritised
- 60. The OFRS Pension Remedy working group is overseeing progress of this project.

Legal Implications

The legal implications section should be completed by a member of the legal service

1. This report has been prepared in accordance with the Oxfordshire County Council's (the "**Council**") responsibilities as the Administering Authority for the Oxfordshire Pension Fund.
2. As Administering Authority, the Council is responsible for managing and administering the Local Government Pension Scheme pursuant the Local Government Pension Scheme Regulations 2013 ("**LGPS Regulations 2013**").
3. The Council as Administering Authority determines its own governance arrangements and the delegation of those responsibilities which is set out in the Council's Governance Strategy Statement (v 2025). Pension Fund Reports are a non- executive function and presentation before Cabinet is not required.
4. Oxfordshire County Council as Administering Authority for the Fund delegates all functions relating to the management of the Pension Fund to the Pension Fund Committee. Certain functions are then further delegated by the Pension Fund Committee to Officers in accordance with the Scheme of Delegation. Officers report decisions back to the Pension Fund Committee.
5. Regulation 53A (Appointments that must be made by administering authorities) of the LGPS Regulations 2013 to be implemented with effect from 1st April 2026 by the Local Government Pension Scheme Amendments Regulations 2026 will requires the Administering Authority to have a senior Local Government Pension Scheme officer, "who has senior responsibility across all pension functions to ensure the fund is appropriately managed and resourced across administration, investment and governance matters" which much be in accordance with guidance issued by the Secretary of State. (**S53A(1)**) The senior Local Government Pension Scheme officer ("**the senior LGPS officer**") is a statutory role.
6. The senior LGPS officer role is responsible for all aspects of managing the Local Government Pension Scheme within the Administering Authority.
7. In carrying out its functions, the Pension Fund Committee must act within the statutory framework governing the Local Government Pension Scheme (the "**LGPS**"), including pursuant to the Local Government Pension Scheme Regulations 2013, the Administering Authority's required governance and administration requirements, and the approved Pension Fund Governance Policy and Scheme of Delegation.
8. The Administering Authority must have regards to and publish its Pension Fund Strategy and any revisions pursuant to s59 of the LGPS Regulations 2013.
9. Any procurement, contractual, or data-handling matters connected with the implementation of decisions are managed in accordance with the Council's

Contract Procedure Rules and Data Protection obligations. Further legal advice will be requested and provided where required. The senior LGPS officer has provided the legal team with full information relating to this report for review and consideration and answered any queries raised.

10. Both Section 151 Officer and the senior LGPS officer should approve pension fund accounts.
11. Legal team is assured that the Pension Fund Committee has taken appropriate advice to ensure the Committee fulfils its fiduciary duties to Scheme members and employers.
12. In view of all information provided, legal review of legislative and regulatory requirements, including impending enacted amendments to LGPS Regulations 2013, and the cogency of information provided by the senior LGPS officer who has consulted with the S151 Officer, the Pension Fund Committee Report, provided appropriate approval of pension fund accounts is provided pursuant to paragraph 70 above, the contents of this report satisfy the requirements of the LGPS Regulations 2013 (as amended) in respect of its administration, operation and management. The Council's legal team is satisfied that all regulatory, legislative and governance requirements pertaining to Oxfordshire County Council as Administering Authority are complied with, by the level of engagement, documentation provided for review, explanation and scrutiny offered by the senior LGPS officer and our opportunity for review.

Staff Implications

61. The team currently has 11 vacant positions, 4 of which are being covered by agency staff.
62. Recruitment is in progress for 5 Administrator roles, and the team is actively developing existing administrators who have expressed interest in advancing to Senior positions.
63. Due to previous recruitments being unsuccessful, the Senior positions will be advertised on a rolling basis to maximise advertisement both internally and externally.
64. The team has demonstrated exceptional performance during a period marked by challenging circumstances and the introduction of additional projects such as McCloud and Dashboards. Upcoming developments—including Access and Fairness regulations, as well as Local Government Reform—are expected to further increase workload and pressure on the team, in addition to the rising volume of routine cases, as supported by the statistical evidence.
65. Overtime and agency staff have supported the current workload; however, this is not sustainable and the wellbeing of staff needs to be recognised. It is anticipated the workforce planning exercise will address the current staff recruitment and retention issues.

[Equality & Inclusion Implications]

66. N/A

[Sustainability Implications]

67. N/A

[Risk Management]

68. N/A

[Consultations]

69. N/A

Lorna Baxter

Annex:

- 1 – Benefit Team Case Volumes
- 2 – Benefit Team Performance
- 3 – Benefit Team Comparative Statistics
- 4 – Telephone Statistics
- 5 – Comparative Telephone Statistics
- 6 – Fire Scheme Statistics
- 7 – Pension Dashboard Project
- 8 – McCloud Project Plan
- 9 – McCloud Results

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