

PENSION FUND COMMITTEE

07 March 2025

ADMINISTRATION REPORT

Report by Executive Director Resources and Section 151 Officer

RECOMMENDATION

1. **The Committee is RECOMMENDED to note the decision made on the Fire Remedy project by the delegated Manager on behalf of the Pension Fund Committee.**

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 confirms a breakdown of the benefit administration work completed in the last quarter, October to December 2024.
4. There were 6,877 new cases created: an increase of 515 from the previous quarter, mainly relating to new starters, which increased by 744.
5. The team completed 6,800 cases, of which 87% were completed within SLA deadline, an increase of 7.2% from the previous quarter.
6. There were 1,912 cases outstanding at the end of the period, an increase of 170 from the previous quarter. At the time of writing this report, this number has reduced to 1,484.
7. Annex 2 contains the volume of e-mails received per month from April to December 2024. These include a mixture of new case requests and member queries.

8. Annex 3 contains the telephone statistics for the period October to December 2024. The two additional telephone numbers highlighted missing in the previous report are now included and shown as General Payroll Queries – AA and Pension-MSS-AA.
9. Telephone statistics will be built into monthly performance reviews from April 2025 to monitor and improve customer service. It should be noted that the current statistics are not considered a concern, and no complaints have been received on the service.
10. There is no pension scams reported in the last quarter October to December 2024. All transfer payments made from the scheme are checked vigilantly to ensure due diligence checks have been carried out correctly.

Statutory Returns

11. A breach report has been submitted to the Pension Regulator in connection with the Fire Scheme Active and Deferred benefit statements which were not issued by 31 August 2024 because of the complexity of the pension age discrimination remedy work.

Fire Service Administration

12. In the last quarter October to December 2024, the team completed 121 cases of which 75% were completed within SLA deadline. At the point of writing this report, there are 89 cases outstanding.
13. Annual benefit statements were issued to most Active scheme members by 31 October 2024. The deferred remediable service statements were further delayed pending a software update to enable these to be issued. This release has now been delivered, and testing is continuing to enable statements to be issued by the deadline of 31 March 2025.

Employer Monthly Returns

14. On 31 December 2024, 3.5% of returns (44 employers) were not vetted. This was due to performance related issues which have now been resolved. The workload is being redistributed across the remaining team.
15. The vetting process is currently under review to improve the quality of checks, reporting and monitoring of workload and performance. This will ultimately reduce time spent on the end of year process.
16. In the last quarter, to 31 December there is:
 - 2 new admissions.
 - 3 academy conversions.2 closure valuations, which will become 4 new admissions pending the employer telling us the new provider.

Member Self Service

17. Annex 4 confirms the latest numbers signed up to Member Self-service.
18. Communication has been issued to employers annually since 2019 offering a list of staff who have not made a positive election, to help encourage staff to sign up. The last communication was issued in July 2024.
19. Activation codes will be issued to members as part of the preparation of 2025 ABS to encourage members to sign up.

Employer SLA Monitoring

20. In the last quarter to 31 December 2024, no fines were issued to employers.

Financial Implications

Transfers

21. In the last quarter October to December 2024, a report on the values of transfers paid in and out of the fund confirmed £4.1 million was transferred into the fund and £4.8 million was transferred out of the fund.

Invoices Outstanding

22. On 31 December 2024, there were 11 outstanding invoices amounting to £328,392.56, of which £316,851.16 relates to an employer cost for early release of employee benefits. This has now since been paid.

Contribution Monitoring

23. In the quarter October to December 2024, 19 payments were made past the deadline of 19th month following payroll. These relate to 14 employers and affects a total of 148 employees.
24. There are 5 employers who missed the deadline on more than one occasion in the last quarter. This affects 12 employees in total, and we are working with these employers in line with the Administration Strategy to improve performance.

Complaints

25. The table below shows number of complaints for each financial year.

Year	Informal	Resolved	IDRP Stage 1	Upheld	IDRP Stage 2	Upheld	TPO
2023/24	18	16	9	1	8	2	1
2024/25	18	16	2	2	1	0	1

26. In the current year 2024/25, there have been 18 informal complaints to 31 December 2024, an increase of 3 cases from the previous quarter.
27. Two cases relate to the same person and is resolved and 1 has progressed to IDRP Stage 2 relating to an ill-health appeal, which is currently on-going.
28. The Pension Ombudsman case in the last report has been resolved informally. The complaint was upheld and Oxfordshire Pension Fund made payment of £500 compensation and £626.32 for financial redress to the member.

Historic Death Cases

29. The review of historical deaths highlighted in previous reports has been put on hold whilst we focus on statutory projects and deadlines, with a view that this has no ongoing impact on the pension fund or service. An update will continue to be provided at these meetings.

Legal Implications

Pension Dashboard Project

30. Annex 5 confirms The Pension Dashboard project plan. There has been no movement since the last report, however the contract is due to be completed by early March.
31. A new date to install the Integrated Software Provider (ISP) has been scheduled for March 2025, with a contractual agreement to complete by August 2025 ensuring we meet our statutory deadline of 31 October 2025.
32. Data cleansing of pension records is being carried out, including liaising with AVC providers to ensure we are compliant with the dashboard requirements.

McCloud Project

- 33. Annex 6 confirms the current position of the McCloud Project. The focus continues to be on status 1 and 4 records ahead of issuing Annual Benefit Statements (ABS) with the McCloud Remedy included by 31 August 2025.
- 34. OCC status 1 have 15 cases remaining that we are currently unable to run due to a system error. These are being investigated by our system provider.
- 35. OCC status 4 have had all data checked and uploaded. A bulk calculation is required to complete the outstanding 96 cases, after which these are complete.
- 36. For non-OCC cases, the team have a weekly completion target of 375 cases with a target end date to be completed by 31 May 2025 ready for ABS preparation. Regular meetings and feedback are being provided to stay on track.
- 37. There are 2FTE staff resourced to this project, and good progress has been made to date, however unforeseen absence has impacted this work and therefore remains an amber rating on the Risk Register.

Age Discrimination Remedy – Fire Service

- 38. Remedy work will conclude in March 2025 when the remaining pensioner members will be contacted with their options and any members where we are unable to carry out remediable work due to guidance still being awaited.
- 39. The remedy work has highlighted that if a firefighter has had a period of authorised unpaid absence since 2015, they have not been offered the opportunity to repay the pension contributions owing for the unpaid period.
- 40. The employer is working to rectify this error, and all regular firefighters will be individually contacted with full details of the contributions owing.
- 41. The Chief Fire Officer has decided that on-call firefighters will be contacted with details of their service breaks, and provided with a worked example of the effect that this could have on ongoing pension rights. A tailored quote will be provided on request if required.

On-call Second Options Exercise – Fire Service

- 42. The second options exercise for on-call firefighters was due to conclude on 31 March 2025, but a consultation has just ended, with the likelihood that the closing date will be extended by one year to 31 March 2026.

- 43. Any quotes issued by 31 March 2025 will require a decision to be made by the member by 31 March 2025, and this has been highlighted as a possible disparity in the consultation response submitted by the Local Government Association.
- 44. A decision has been taken by the Chief Fire Officer to carry on issuing quotes in the interim period up to 31 March, with the understanding that if anyone is unhappy, they can contact us individually.

Staffing

- 45. At the point of writing this report the team are carrying 2 Senior Administrator vacancies and 3 Administrator vacancies. There is also one Administrator on maternity leave and two Seniors on long-term sickness.
- 46. In the last recruitment for Administrator positions, we made an offer to 3 candidates; one withdrew due to finding alternative employment, one has started, and one is finalising pre-employment checks with a date to be confirmed.
- 47. A new post has been created in the team, to continue the work on the on-call second options in Fire Service administration, which is currently a temporary position held under the Fire Service due to end in May 2025.

Lorna Baxter

Annex:

- 1 – Benefit Administration Statistics
- 2 – E-mail statistics
- 3 – Telephone statistics
- 4 – MSS Registration statistics
- 5 – Pension Dashboard project plan
- 6 – McCloud statistics

Background papers: Nil

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March 2025