

PENSION FUND COMMITTEE

6 March 2026

ADMINISTRATION REPORT

Report by Deputy Chief Executive (Section 151 Officer)

RECOMMENDATION

1. **The Committee is RECOMMENDED to:**
 - a) **note the report**
 - b) **approve the changes made to the Key Performance Indicators in the Administration Strategy.**

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. Appendix 1 shows the case volumes (number of carried over, new, completed and outstanding cases) during the period October to December 2025. There were 10,369 cases to complete (3,268 carry forward plus 7,101 new cases).
4. The team completed 79.7% of the work, an increase of 5.5% from the previous quarter. There were 3,300 cases to carry forward, an increase of 32 cases from the previous quarter.
5. The increase in completed cases can be attributed to the addition of two agency staff members. These staff are primarily focused on processing leaver cases, which represent the largest proportion of work for the team. As the agency staff gain further training and experience, it is anticipated that both the completion rate and efficiency of the team will continue to improve.
6. Appendix 2 shows the performance measure of the work completed by the benefit administration team in the last quarter, October to December 2025. The team completed 7,194 cases, of which 79.4% were completed within Service Level Agreement (SLA), a decrease of 4.6% from the previous quarter.

7. Appendix 3 presents comparative data on case volumes and completed cases for three most recent quarters, covering April to December 2025. The visual shows the significant increase of completed work in the last quarter, whilst the carry forward has increased.
8. The addition of two agency staff members has enabled the team to successfully manage the influx of new cases. As a result, the demand created by recently opened cases is being met. However, despite these improvements, the volume of cases carried forward from previous periods continues to pose a challenge, contributing to a backlog that has yet to be addressed.
9. To mitigate this issue, members of the team will be undertaking overtime in the upcoming quarter. It is anticipated that this initiative will result in a noticeable reduction in the backlog of outstanding cases. The impact of the overtime arrangement will be monitored and will be reflected in future performance statistics.
10. Appendix 4 contains the telephone statistics for the period October to December 2025. The team received 2,950 calls of which 93.83% were answered, 0.25% less than the previous quarter.
11. Appendix 5 shows a comparison of the telephone statistics for the last three quarters April to December 2025. There are no considerable changes or issues to report.
12. During the last quarter, October to December 2025, there were no pension scams reported. This indicates the effectiveness of current preventative measures within the team's operations.
13. A governance review of the pension transfer process was carried out during the same period. The findings confirmed that robust systems are in place to mitigate risk, ensuring that procedures for handling pension transfers are comprehensive and adhere to established best practices.

Statutory Returns

14. There were no statutory returns made in the last quarter October to December 2025.

Fire Service Administration

15. Appendix 6 shows the Firefighter Scheme administration statistics for the last quarter October to December 2025. The team completed 123 cases of which 82.93% were completed within SLA deadline, an increase of 1.33% from the previous quarter.
16. Ongoing training, limited 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 progress is being made.

Employer Monthly Returns

17. In the last quarter October to December 2025, the team verified 96.5% of the monthly data returns within service level agreement (SLA). There were 3.48% of returns (2 employers) outstanding to carry forward.
18. The team completed 693 cases created from data errors, of which 86.6% was completed within the SLA deadline, an increase of 20.58% from the last quarter.
19. Work is underway to enhance both reporting and workflow management within this area. The objective is to strengthen performance monitoring and increase transparency regarding the team's activities.
20. The developments are expected to provide greater clarity on progress and case handling, thereby supporting continuous improvement. The implementation is scheduled to be completed by 31 March 2026.
21. In the last quarter, to 31 December 2025 there were:
 - 12 new admissions
 - 4 academy conversions
 - 2 closure valuations
 - 3 TUPE

End of Year

22. Preparation is underway for end of year ahead of the 2026 Annual Benefit Statements. Communication is currently being drafted to employers, with a more direct approach aimed where previous issues have been identified, to provide an increased level of support.
23. Statistics will be brought to the next meeting on the progress ahead of issuing Annual Benefit Statements by 31 August 2026.

Member Self Service

24. Appendix 7 confirms the Member Self-service sign up as of 31 December 2025 against the benchmark figures of March 2025. The statistics are split into categories registered, not registered (where no positive election has been made) and opted not to use.
25. The new member self-service portal, Engage, was launched in January 2026. As part of the implementation, all members—both new and existing—are required to re-register on the updated platform. Consequently, an initial reduction in the total number of registered members is anticipated, owing to the re-registration process.

26. Targeted communications will be sent year-round to encourage member sign-ups, and membership numbers will continue to be presented in this report.

Financial Implications

Transfers

27. In the last quarter October to December 2025, £10.4 million was transferred into the fund and £3.9 million was transferred out of the fund, of which £207k 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 October to December 2025.

Value	Number of payments made	Total Amount Transferred
Under £10k	10	£59,650.46
£10k to £25k	5	£71,536.52
£25k to £50k	2	£75,421.49
£50k to £100k	0	£0
£100k to £250k	0	£0
Over £250k	0	£0

29. There are no concerns to report.

Invoices Outstanding

30. As of 31 December 2025, there were five invoices outstanding, with a combined total value of £194,685. Of these, two invoices were overdue, and the overdue amount stood at £3,128.70. The remaining three invoices were not yet overdue and therefore remain within their expected payment terms.

Employer Contribution Monitoring

31. In the quarter October to December 2025, 7 payments were made past the statutory deadline of 22nd of the month following payroll. These are small employers affecting 22 members.
32. One employer has made late payments over several periods and has therefore been issued with notice of a fine and potential reporting to the Pensions Regulator should any future late payments occur.

Complaints

33. The table below shows number of complaints for the previous financial year 2024-25 and the last three quarters April to December 2025 of the current financial 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

34. An additional two IDRPs stage 1 complaints were received in the previous quarter, October to December 2025. One has not been upheld, and one is currently being investigated, and the outcome will be brought to the next meeting.
35. There has been one member who has progressed their complaint to The Pension Ombudsman regarding the final pay used in calculating pension benefits; this is an ongoing case since 2022. It will be reported to this meeting when the outcome has been confirmed.

Pension Dashboard Project

36. Appendix 8 confirms the current position of Pension Dashboard project plan.
37. The Oxfordshire Pension Fund is connected to the Dashboard, and this has been confirmed by The Pension Regulator. The date for the official launch of the dashboard has not yet been determined, however there is access for selected users to test via invitation only, which could potentially create a query for the team.
38. The connection for our AVC providers is in progress, a software upgrade to allow the data to be transferred to the pension system is underway, together with details of AVC fund information so that this data can be submitted to the Dashboard.

Data Quality

39. Data quality reports are subject to regular monitoring to ensure accuracy and compliance with regulatory requirements. The Common Data Score, as reported to The Pensions Regulator for the Local Government Pension Scheme (LGPS), was 94.6%. Furthermore, the Scheme Specific Data score achieved was 99.13%.
40. Of the Common data reviewed, 5.4% did not meet the requirements due to missing address information. While most interactions with scheme members

occur through our online platform accompanied by email notifications, physical mail remains necessary for members who opt out of digital communication.

41. The team are currently testing the implementation of a new data cleanse functionality within our software system that will provide the missing address data for addresses held in the UK. The impact this has on our Common Data score will be reported at future meetings.

McCloud Project

42. Appendix 9 confirms the position of the McCloud Project, following the application to extend the deadline to complete the project by 31 August 2026.
43. The project is being monitored to ensure it remains on track with the focus on active, deferred and pensioner members aiming to complete most of the work by 31 March 2026, with a view that all records requiring rectification is completed by 31 August 2026.
44. The team will soon be sending requests for membership data from other Local Authorities for 4,160 scheme members who have unaggregated membership held in their former pension funds. These will then need to be reviewed for McCloud rectification once the data is received.

Age Discrimination Remedy – Fire Service

45. At the point of writing this report there are 48 active and deferred statements remaining, 12 of which are awaiting further regulatory guidance or information from a third party. The 36 cases that can be processed are on track to meet the deadline of 31 March 2026.
46. There are 35 pensioner cases remain – 18 of these are immediate detriment cases waiting guidance on how to proceed; the remaining 17 are existing pensioners who will be contacted by 31 March 2026.

On-call Second Options Exercise – Fire Service

47. Since the last meeting 44 pensioners have received their benefits, an increase of 8 since the last meeting (£2.7 million paid gross to date).
48. The work is proving to be complex, with many different scenarios. Advice has been issued and is also being sought from LGA in cases where further guidance is required, or where action to take is not clear.
49. A consultation on extending the deadline for completion of the work and proposed amendments to existing regulations has closed and formal Statutory

Instrument for the amendment is impending. Confirmation has been received that the deadline will be extended until at least 31 March 2027.

50. There are 213 statements remaining to be issued. These are being prioritised in order of retirement and any Firefighters indicating that they will be retiring, will also be prioritised.
51. The remaining work includes sending revised quotes to enable existing deferred records to be linked and contacting relatives of deceased members if the amending legislation enables a payment, will be made on receipt of amending legislation.

Staff Implications

52. The current number of vacancies within the team remains unchanged at nine since the previous meeting. To address these gaps, four agency staff members have been successfully appointed. Discussions are ongoing regarding the extension of two of the contracts, ensuring continuity as workforce planning and job evaluation activities are undertaken.
53. Managers are continuing to develop, train and grown existing team members for internal promotion opportunities and to help fill the vacant Senior posts.

Equality & Inclusion Implications

54. N/A

Sustainability Implications

55. N/A

Risk Management

56. N/A

Consultations

57. N/A

Administration Strategy

58. Appendix 10 contains the Administration Strategy. A consultation was issued to all Employers in December 2025 to comment on the proposed changes to the Key Performance Indicators (KPI) for some of the administration work, and

additional statutory KPI's relating to queries received via the Pension Dashboard.

59. Three employers responded to the consultation with queries, all of which have been addressed.
60. The proposed changes are set out in Appendix 12. The first two tasks relate to queries received via the Pension Dashboard. The remaining tasks are existing work carried out by the team.
61. The proposed changes will bring the team's targets in line with the national key performance indicators. This alignment ensures that the timescales for administrative tasks are consistent with those set by other Administering Authorities, so that there is no disadvantage in terms of efficiency or responsiveness.
62. The changes will alleviate the pressure on the team whilst the complexity of the scheme and constant changes prove challenging. It will allow the team to better prioritise their workload ensuring statutory deadlines and the timely payment of pensions remain the central focus of their activities.

Lorna Baxter
Deputy Chief Executive (Section 151 Officer)

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 – Member Self Service Statistics
- 8 – Pension Dashboard Project Plan
- 9 – McCloud Extended Project Plan
- 10 – Administration Strategy

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February 2026