PENSION FUND COMMITTEE

4 September 2026

ADMINISTRATION REPORT

Report by Deputy Chief Executive (Section 151 Officer)

RECOMMENDATION

The Committee is RECOMMENDED to note the report.

Executive Summary

1. 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

2. Annex 1 shows the case volumes (number of carried over, new, completed and outstanding cases) during the period April to June 2026. There were 8,954 cases to complete (2,001 carry forward plus 6,953 new cases).

3. The team completed 76.1% of the work, a decrease of 2.1% from the previous quarter. There were 1,716 cases to carry forward, a reduction of 572 cases from the previous quarter.

4. The team continues to work overtime on leaver cases beyond the original deadline of 31 May 2026 to prevent the backlog increasing while vacant posts are filled. To date, 1,500 cases have been allocated, with approximately 200 remaining for completion by 31 August 2026. This work has helped reduce the carry-forward figure.

5. Annex 2 shows the Key Performance Indicator (KPI) performance measure of the work completed by the benefit administration team in the last quarter, April to June 2026. The team completed 7,238 cases, of which 85.5% were completed within Service Level Agreement (SLA), a decrease of 7.4% from the previous quarter.

6. The change to SCAPE rate factors has created additional challenges and affected performance. These factors are used daily to administer the Local Government Pension Scheme (LGPS), including cash-equivalent transfer

values (CETVs), early and late retirements, and additional pension purchases. The revised factors were confirmed on 19 May 2026, requiring some calculations to be paused while system providers updated the software. As some factors affect retirement calculations, manual calculations, additional checks and updated process notes have been needed to ensure the changes are applied correctly.

7. Annex 3 shows a comparison of case volumes and completed cases for April to June in the last three years, 2024 to 2026. The visual illustrates the increase in the number of new cases, whilst it also demonstrates an improvement in overall completion and performance of the team.

8. Annex 4 contains the telephone statistics for the period April to June 2026. The team received 3,941 calls an increase of 409 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.

9. Annex 5 compares telephone statistics from April to June in the last three years, 2024 to 2026. The visual illustrates an increase in incoming calls, particularly in 2026, which predominantly relates to member self-service registration enquiries following the update to the new portal, Engage in January 2026.

10. In the last quarter, 3,639 e-mails were received to the main pension service inbox. A reduction of 439 from the previous quarter.

11. From 14 April 2026, a new contact us form was made available to customers encouraging contact with the pension fund via this method, which better routes the enquiries to the correct team, and to mitigate the several contact avenues creating duplicated enquires.

12. For the last quarter, April to June 2026 there were 162 queries received. It is expected the number of e-mails to continue to decrease and enquiries via contact us route to increase moving forward. Statistics to monitor the shift will be presented to this meeting.

Pension Scams

13. During the last quarter, April to June 2026, there were no pension scams reported. The team process has recently been reviewed by to ensure robust systems are in place to mitigate the risk of scams, which identified no action required.

Statutory Returns

14. There were no statutory returns made in the last quarter April to June 2026.

Fire Service Administration

15. Annex 6 shows the Firefighter Scheme administration statistics for the last quarter April to June 2026. The team completed 118 cases of which 87.3%

were completed within SLA deadline, an increase of 9.2% from the previous quarter.

16. Team members continue to be trained on the Fire schemes and new processes connected with Remedy and the Second Options Exercise for On-Call Firefighters.

17. The work remains complex, with ongoing training, workload pressures, and overlap between the Remedy and Second Options projects continuing to affect SLA performance.

Employer Monthly Returns

18. The team has begun introducing new Key Performance Indicator (KPI) workflow procedures. The new reports will improve transparency around work volumes, support more practical feedback during monthly staff reviews, set clearer performance expectations, and enable overall team performance improvements to be monitored for reporting to this Committee.

19. Several reporting procedures are now in place, but further procedures, workflows and reports still need to be created and tested to ensure accurate reporting and a smooth transition. The team is sample testing cases and expects to expand the reporting list over the next six months.

20. The cases currently reported relate to errors identified from the I-connect submission from the employer, which needs to be resolved to ensure correct data is held on the members pension record.

21. Annex 7 shows the case volumes of current procedures in place (number of carried over, new, completed and outstanding cases) during the period April to June 2026. There were 819 cases to complete (182 carry forward plus 637 new cases). The team completed 87.2% of the work leaving 156 cases to carry forward.

22. Annex 8 shows the employer team's KPI performance for April to June 2026. The team completed 663 cases, with 75.6% completed within the Service Level Agreement (SLA).

23. In the last quarter, April to June 2026 there were:

- 16 admissions in progress
- 2 admissions completed

24. A project is underway to review and document the current employer admission and closure processes, including the associated paperwork. The review has identified several historical cessations requiring further investigation to confirm that each stage of the process has been completed.

25. There are 61 employers affected; 16 have been completed and the remaining 45 are in progress. An update on this project will be provided at the next meeting.

End of Year

26. At the time of writing, the bulk of the queries remain outstanding with three employers, affecting 175 scheme members. The team are working with the employers to resolve the queries.

27. Annual benefit statements have been issued to scheme members for 88 employers. A final update on the number issued by 31 August 2026 will be provided at this meeting.

Member Self Service

28. At the date of this report, 16,007 LGPS members have registered for the new member self-service portal, representing 18% of total scheme membership; twice the number reported at the last meeting.

29. Annex 9 shows the registration statistics at 30 June 2026 versus the statistics on the former member self-service platform at 31 December 2025.

30. Targeted communications are being issued to encourage registration, including recent messages to pensioners with payslips and future reminders in annual benefit statements for active and deferred members.

31. Employers are also asked regularly in our monthly communication to encourage staff to register for the platform.

Financial Implications

Transfers

32. In the last quarter April to June 2026, £3.2 million was transferred into the fund and £5.6 million was transferred out of the fund, of which £680k related to payments made to non-Local Government Authorities.

33. The table below provides a breakdown of the values and numbers of transfers out payments made to non-Local Authorities in the last quarter April to June 2026.

Value	Number of payments made	Total Amount Transferred
Under £10k	12	£45,122.21
£10k to £25k	5	£76,189.40
£25k to £50k	0	£0
£50k to £100k	1	£57,861.28
£100k to £250k	1	£230,672.04

Over £250k	1	£269,812.52

34. The procedure and due diligence checks for transfers paid out of the fund has recently been reviewed by the General Code of Practice compliance assessment. The report confirmed Oxfordshire Pension Fund is one hundred percent compliant in this area.

Invoices Outstanding

35. At point of writing, there are 5 invoices outstanding amounting to £4,628.70. Two invoices totalling £3,128.70 relate to the previous financial year and are with the income recovery team.

Employer Contribution Monitoring

36. During the period April to June 2026, seven payments were received after the statutory deadline of the 22nd day of the month following payroll. All cases were resolved within the follow-up deadline and, as a result, no further action was required.

37. Recurring late payments continue to be monitored and escalated where appropriate. There are no cases to report to this meeting.

Complaints

38. The table below shows number of complaints for the previous two calendar years measured from January to December, and from January to June 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	21	16	8	2	2	0	1

39. Most IDRP stage 1 complaints relate to members missing the deadline to transfer frozen refunds out of the fund, which is set by Oxfordshire Pension Fund as a discretion. Cases will be monitored and the decision revisited if necessary.

40. There are three cases outstanding: two fire scheme IDRP stage 1 cases awaiting further advice, and one employer appeal against an exit credit, which is under independent review.

Pension Dashboard Project

41. Annex 10 confirms the current position of Pension Dashboard project plan.

42. The Fund's AVC providers are required to be connected by 31 October 2026. The LGPS software upgrade has been completed for one AVC provider, and further development is required to enable connection for another provider. The team will commence testing of member AVC fund information uploads to ensure readiness for submission to the Dashboard.

.

Data Quality

43. The data quality scores remain unchanged since the last meeting. The scores remain common data 94.6% and scheme specific data 99.13%.

44. Testing continues with 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.

45. Changes to the reporting process have been needed to ensure missing addresses are correctly identified. This additional work has extended the testing and implementation timetable; however, the team continue to work with the system provider. Updates on progress will be brought to this meeting.

McCloud Project

46. Annex 11 confirms the position of the McCloud Project, following the application to extend the deadline to complete the project by 31 August 2026.

47. The team are working overtime to complete the remaining cases, which are complex and taking some time where aggregation work needs revisiting,

48. Some cases are expected to remain incomplete by the deadline predominantly due to unresolved system errors currently being investigated by the software provider, and regulatory guidance outstanding on how to recalculate the cases.

49. The affected cases will receive a letter to confirm the position, and a report of a breach will be made to The Pension Regulator (TPR) as per the TPR guidance. Final numbers of those affected will be confirmed at this meeting.

Access and Fairness Project

50. Annex 12 details the project timeline for the implementation of the Access and Fairness regulations, which came into effect on 1 April 2026.

51. The team communicated the key changes to employers around Gender pensions gap, access to the LGPS for elected members and opt out reporting requirement, both by e-mail, monthly communication and by webinar to train

on how the changes should be implemented and giving opportunity for questions. This was well attended.

52. The LGPS survivor benefit guidance require the team to review historical records and where records are incomplete taking reasonable steps to obtain evidence. Survivors will then need to be identified, with guidance suggesting the use of tracing agencies and issuing standard communications via the website and newsletters. This piece of work has a deadline to be completed by 1 October 2026.

53. The team are currently using reports provided by the pension software provider to identify the number of cases in scope for review. An update of the progress of this project will be reported at future meetings.

Technology Development

54. Work is underway to procure a service to provide a mail solution for incoming and outgoing mail by hybrid mail, to support the team with agile working and efficiency of sending mail, currently requiring staff to go into the office and send in batches.

55. The team are currently scoping procedures and testing an enhance version of the connection between calculating benefits and making payment of benefits through our payroll team.

56. The system is designed to mitigate manual calculations, reducing paper instructions between the teams and overall, more efficient processing. The target date for implementation is autumn 2026.

Age Discrimination Remedy – Fire Service

57. At 30 June 2026 there were 4 active and 1 deferred statement outstanding, all awaiting information from external bodies to be able to proceed.

58. There were 34 pensioner cases remaining – 18 of these are immediate detriment cases where we are waiting guidance on how to review. 16 are existing pensioners where work is in progress. The OFRS Pension Remedy working group is overseeing progress of this project.

On-call Second Options Exercise – Fire Service

59. The Fund has received and acknowledged 290 requests for further information. Regular communications continue to be provided on quotation timescales. Nine members have indicated that they do not wish to receive further information.

60. Data has been collated for the members who have returned their expressions of interest in preparation for the process of calculating benefit entitlement and

cost. Quotes are currently being issued and are being sent in cohort order, with those with an immediate entitlement to pension benefits being sent first.

61. The project deadline is 31 March 2027. To date, 127 statements have been issued, and 68 pensioners have received benefits, totalling £3.2 million gross. A further 160 statements remaining will aim to be issued by 30 September 2026, allowing members six months to make an election by the deadline.

62. The OFRS Pension Remedy working group is overseeing progress.

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

63. Since the last meeting, the team have successfully recruited 5 Administrators, due to start in the autumn. This will fill some vacancies in the benefit administration team and employer team.

64. Several vacancies remain within the team following the workforce planning exercise. Recruitment activity for these posts is currently underway, with a further update to be presented at the next meeting.

[Equality & Inclusion Implications]

65. N/A

[Sustainability Implications]

66. N/A

[Risk Management]

67. N/A

[Consultations]

68. N/A

Lorna Baxter

Annex:
1 – Case Volumes - Benefits
2 – KPI Performance - Benefits
3 – Benefit Comparative Statistics
4 – Telephone Statistics
5 – Comparative Telephone Statistics
6 – Fire Administration Statistics
7 – Case Volumes – Employers
8 – KPI Performance – Employers
9 – Member Self-Service Statistics
10 – Pension Dashboard Project
11 – McCloud Project
12 – Access and Fairness Project

Contact Officer: Vicki Green, Pension Services Manager
E-mail Vicki.green@oxfordshire.gov.uk
Telephone 01865 323660

September 2026