

# **Warwickshire Fire and Rescue Local Pension Board of the Firefighters' Pension Scheme**

## **Pensions Administration Activity and Performance update**

9 November 2021

### **Recommendation(s)**

1. The Local Board is asked to note and comment on this report.

### **1. Executive Summary**

- 1.1 This report updates the Board on key developments affecting Fire Pensions administration and the performance of the Pensions Administration Service (PAS).

### **2. Financial Implications**

- 2.1 Any financial implications are dealt with in the body of the report.

### **3. Environmental Implications**

- 3.1 None

### **4. Change of service provider**

- 4.1 The transfer of the administration of firefighter pensions and pensioner payroll service to West Yorkshire Pension Fund has begun. An implementation project timetable has been agreed and a project team with representatives from the service areas affected has been created.
- 4.2 The service is set to transfer on 1<sup>st</sup> April 2022, and project meetings have been scheduled fortnightly, up to the transfer date.
- 4.3 A communication plan has also been drawn up to ensure that all stakeholders are informed of the change of provider and where to direct queries to.
- 4.4 The Pensions administration software provider has been notified and the extraction of data has been planned. Following the transfer, data will be held at Warwickshire County Council (WCC) for 6 months to help with any queries.

After 6 months the data will be removed, and the PAS will no longer have access to it. From that point, all queries will be dealt with by the new provider.

## **5. Breaches**

- 5.1 There has been one breach recorded in respect of the late issue of 8 Annual Benefit Statements that were not sent out by 31<sup>st</sup> August 2021. This was due to an issue with the office printer, as these statements are produced in house. As this was such a small number and the statements were issued by the end of September, this has not been reported to the Pensions Regulator. No complaints have been received from these members.

## **6. Internal dispute resolution procedure (IDRP)**

- 6.1 There have been no IDRPs received since the last board meeting.
- 6.2 There is one case where a preliminary determination has been received from the Pensions Ombudsman. The determination has made suggestions as to where the member has not received a satisfactory service from WCC and that we should re-consider the decision made in this particular case. A response has been put together by legal services and we await the final determination.

## **7. Pension saving statements**

- 7.1 Pension saving statements have been issued by the deadline of 6<sup>th</sup> October 2021. An information session presented by Pengage Ltd has also been held and attended by members affected by tax charges on their pension benefits.

## **8. McCloud/Sergeant update**

- 8.1 A data request has now been sent to WCC payroll for data required for members affected by the age discrimination remedy. This is to check for any part time hours changes and service breaks that have occurred in the remedy period. This also asks for information regarding the value of contributions for the different schemes. This information will be used to assess whether a member has overpaid or underpaid contributions when they move back to their legacy scheme.
- 8.2 A letter for members in scope for the age discrimination remedy has been put together, this will also incorporate information about whom to contact if a member has a query following the transfer of the service to West Yorkshire. This will be going out shortly.
- 8.3 On 8<sup>th</sup> October information regarding the Immediate Detriment Framework was received. The Memorandum of Understanding (MoU - Appendix 1) sets

out the agreement between the Local Government Association (LGA) on behalf of Fire & Rescue Authorities (FRA) and the Fire Brigade Union (FBU) on behalf of members, on the treatment of immediate detriment cases as set out in Annex 1 of the Framework.

8.4 Annex 2 of the Framework (Appendix 2) details the process that should be followed by pensions administrators for immediate detriment cases. This includes the completion of a 'record of agreed compensation/remedy' that will need to be signed by both the member and the FRA. This will be sent out to the individuals affected by cases that have already been processed.

8.5 We have processed 10 cases where the member has elected to take payment of pension benefits under their legacy scheme for the remedy period. We have 5 retirement cases where benefits were paid based on being a member of the 2015 scheme at retirement. These will now have to be revisited and given the option to take benefits based on their legacy scheme only.

## 9. Matthews/O'Brien case – 2nd modified retained exercise

9.1 There is no update at this time, however it is expected that further information will be available early next year. It is anticipated that West Yorkshire will complete the work required in connection with this project.

## Appendices

1. Appendix 1 - Immediate Detriment – Memorandum of Understanding
2. Appendix 2 - Annex 2 Framework

## Background Papers

1. n/a
- 2.

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