

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

23 September 2024

Fire Pensions Administration Update

Recommendation

That the Warwickshire Fire and Rescue Local Pension Board notes and comments on the matters in this report and in the administration report provided by West Yorkshire Pension Fund (WYPF) dated April 2024 at Appendix [1].

1. Executive Summary

- 1.1 From 1 April 2022, WYPF have provided the pension administration service for Warwickshire County Council as Fire and Rescue Authority in relation to the Firefighter's Pension Schemes. As part of this service a monthly report is provided by WYPF, which gives details of the work they have undertaken, key performance indicators, and other relevant information regarding the membership of the Firefighter Pension Schemes.

2. Financial Implications

- 2.1 None arising directly from this report.

3. Environmental Implications

- 3.1 None arising directly from this report.

4. Supporting Information

- 4.1 The latest report provided by WYPF is for July 2024 and is attached at Appendix 1.
- 4.2 The report has been shared with stakeholders at the Council.
- 4.3 In relation to Key Performance Indicators (KPI), West Yorkshire Pension Fund have one KPI they have not met. This was a case of deferred benefits set up on leaving. The KPI was not met due to high volumes of work within the team, however, the member did receive confirmation within 2 months of WYPF

receiving the leaver information that they have a deferred benefit. This meets the statutory requirements.

- 4.4 A breach has been reported to the Pension Regulator with regards to issuing of Annual Benefit Statements. The breach has been reported by both West Yorkshire Pension Fund and Warwickshire County Council in line with advice from the Local Government Association.
- 4.5 West Yorkshire Pension Fund have issued 100% of Annual Benefit Statements to members who are not in scope for Age Discrimination Remedy by the 31 August deadline. Members of the pension scheme who are in scope for the age discrimination remedy have not been issued with an Annual Benefit Statement by the 31 August deadline due to late regulations being issued for the age discrimination remedy and the need for software to be developed. West Yorkshire Pension Fund are working towards a deadline of 31 December for the issuing of statements for members effected.

Second Retained Exercise

- 4.6 On 1 October 2023 the Firefighters' Pension Scheme 2006 (England) (Amendment) Order 2023 came into force. This enables Retained Firefighters to buy back pension service in the 2006 scheme prior to 01/07/2000 if they meet certain set criteria.
- 4.7 Warwickshire Fire and Rescue Authority have identified 144 people in scope for this project. 57 people identified as being in scope have engaged with the pension fund around the project. The remaining individuals are currently going through a tracing exercise with tracing company ITM to ensure that we are communicating with current address data and individuals have a chance to pension options with the project deadlines.
- 4.8 Warwickshire Fire and Rescue Authority have begun to send individual calculation options to members who have expressed an interest in the purchase of service. Processes for the collection of contributions and the transfer of data to West Yorkshire for members who wish to purchase service are now in place.
- 4.9 The work for this exercise must be completed by April 2025 under current regulations.

McCloud/Age Discrimination remedy

- 4.10 The Council's payroll team have worked on collecting data needed by West Yorkshire Pension Fund for the McCloud age discrimination remedy this quarter. This has included calculations in relation to scheme contributions for the remedy period, taking into account the need for tax relief and interest.
- 4.10 McCloud compensation payments are now being made to individuals. Warwickshire County Council have set up processes for the recording of

financial information that will be needed in relation to these payments on a quarterly basis. Compensation payments are made for a variety of reasons such as refund of contributions or for financial advice in complex tax situations, in line with Scheme Manager guidance issued.

Temporary Promotions

- 4.11 In the last meeting we updated the board on an issue identified where pension contributions had been taken incorrectly for some firefighter pension scheme members who had received a temporary promotion.
- 4.12 The Warwickshire HR and Payroll teams have now processed refunds for all firefighter members that have applied for a refund.
- 4.14 Warwickshire HR and Payroll teams are liaising with West Yorkshire Pension Fund to ensure corrected data is provided for pension calculations for any affected members.

5. Timescales associated with the decision and next steps

- 5.1 None

Appendices

Appendix 1 – July 2024 monthly report.

	Name	Contact Information
Report Author	Lisa Eglesfield, Pension Administration Service Manager, Ian Morris, Membership Team Manager	lisaeglesfield@warwickshire.gov.uk , ianmorris@warwickshire.gov.uk
Director	Purnima Sherwood, Director of Finance	purnimasherwood@warwickshire.gov.uk
Executive Director	Rob Powell, Executive Director for Resources	robpowell@warwickshire.gov.uk
Portfolio Holder	Cllr Peter Butlin, Portfolio Holder for Finance and Property	peterbutlin@warwickshire.gov.uk

The report was circulated to the following members prior to publication:

Local Member(s): n/a

Other members: Cllrs Dahmash and Gifford