



West Yorkshire Pension Fund

Firefighters Pension Scheme

**LEICESTER, LEICESTERSHIRE AND RUTLAND COMBINED FIRE AUTHORITY
LOCAL PENSION BOARD**

2 DECEMBER 2021

**REPORT FROM WEST YORKSHIRE PENSION FUND – PENSION
ADMINISTRATOR**

PENSION FUND ADMINISTRATION REPORT

Purpose of the Report

1. To inform the Combined Fire Authority (CFA) Local Pension Board of firefighter pension administration activity in the quarter 1 July 2021 – 30 September 2021.
2. This is designed to assist the CFA Local Pension Board. It is also considered best practise to provide a report of this type.

Recommendation

3. That the Local Pension Board notes the update provided on the administration of the firefighter pension scheme for the period 1 July 2021 – 30 September 2021.

Background

Annual Benefit Statements

4. There is no further update since the last meeting.

Pension Savings Statements

5. 18 members breached the Annual Allowance threshold for the 2020/21 tax year. 17 were sent their Pension Savings Statement (PSS) before the 6 October deadline. One case required additional pay information which wasn't supplied until 19 October 2021. WYPF then have a new three-month window to supply the PSS, however it was sent to the member on 1 November 2021.

Regulation Changes

6. None since the last report.

Risk and Breaches – (material or not)

7. None.

Update on Sargeant case (transitional protections remedy)

8. The Leicester, Leicestershire and Rutland Combined Fire Authority (CFA) made the decision to allow upcoming retirements under Immediate Detriment and we are now providing the retirement quotes on that basis. Following on from this the National Framework Agreement – Memorandum of Understanding (MoU) was published on 8 October 2021. This agreement puts more members in scope to be dealt with as it now includes those who were entitled to a Contribution Holiday and those members who have already retired from the 2015 Scheme (Category 2 members).

The CFA now needs to decide if they will be signing up to this framework agreement and if they do there will be a number of different communications which will need to be considered.

The MoU provides timescales in which cases should be dealt with and there are 62 days from the receipt of a Category 2 member submitting their application to then receive details of all the information required to make a decision. The 62 days provide time for both the FRA and WYPF to deal with all the stages within the process.

Sargeant and Data Collection (age discrimination remedy)

9. The data collection template has now been received from the software supplier and WYPF is testing the output to ensure it is pulling all the information from the member records as expected.

Matthews (retained/part-time firefighters)

10. There is no update on this. The Home Office should now have completed their consultations with interested stakeholders. They have indicated there will be an 18 months' consultation period before the regulations come into force and then FRAs will have a further 18 months to complete the exercise.

Key Performance Indicators - 1 July 2021 to 30 September 2021

11. The Table below details performance against each of the Key Performance Indicators for the period 1 July 2021 – 30 September 2021:

WORKTYPE	TOTAL CASES	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIUM TARGET PERCENT	TARGET MET PERCENT	AVERAG E TIME TAKEN (DAYS)
Age 55 Increase to Pension	6	20	6	85	100	18.17
Change of Address	7	20	5	85	85.71	4.71
Change of Bank Details	2	Next Payroll	2	85	100	5.5
Death Grant Nomination form	12	20	9	85	75	11.5
Death in Retirement	4	5	4	85	100	1
Deferred Benefits set up on leaving	4	10	2	85	50	6.5
Divorce Settlement – Pension Sharing order Implemented	0	80		100		
General Payroll Changes	7	Next Payroll	7	85	100	1.14
Initial letter Death in Retirement	4	5	4	85	100	1.25
NI adjustment to Pension at State Pension Age	5	Next Payroll	5	85	100	16.4
Payment of Spouses/Child Benefit	0	10		100		
Pension Estimate	9	10	8	85	88.89	5.22
Pension Saving Statement	0	20		100		
Pension Set Up Payment of Lump Sum	6	3	6	85	100	2.67
Retirement Actual	6	10	6	85	100	2.67
Set Up New Spouse Pension	0	5		85		
Spouse Potential	2	20	2	85	100	17.5
Transfer In Actual	0	10		85		
Transfer In Quote	0	10		85		
Update Member Details	8	20	8	100	100	1

Officers to Contact

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