



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

**16 JUNE 2021**

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

**PENSION FUND ADMINISTRATION REPORT**

**Purpose of the Report**

1. The purpose of this report is to inform the Combined Fire Authority (CFA) Local Pension Board of fire fighter pension administration in the quarter 1 January 2021 – 31 March 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 fire fighter pension scheme for the period 1 January 2021 – 31 March 2021.

**Background**

**Annual Benefit Statements**

4. West Yorkshire Pension Fund has started the preparation work for the production of the Annual Benefit Statements 2021.

In line with guidance from the Local Government Association (contained in Bulletin 44) the statements will not reflect the remedy choice between legacy and reformed benefits and the current values will be based on the members' current scheme membership only.

Projections will still be supplied for those members who have already transitioned into the 2015 Scheme.

Projections will not be supplied on the statements for protected members. This is because any projections past 31 March 2022 on a final salary basis will produce inflated/incorrect benefits as these members will now move into the 2015 Scheme on 1 April 2022

The Annual Benefit Statements will be available to view and download only from the members' online 'My Pension' account. We will be writing to members about this shortly

#### Regulation Changes

5. None since the last report.

#### Risk and Breaches – (material or not)

6. None.

#### Update on Sargeant case (transitional protections remedy)

7. The age discrimination consultation response was published on 4 February 2021. The Home Office also published a frequently asked questions document on the same date.

Implementation will happen in two parts

- Prospective remedy – All active members of the pension schemes will become members of FPS 2015 from 1 April 2022
- Retrospective remedy – giving all affected members their options under the Deferred Choice Underpin (DCU) for their remedy period

#### Sargeant and Data Collection

8. There is a lot of data required to provide the DCU options to members and the LGA produced the information in May (in Bulletin 44).

[FPS remedy data collection template](#)

[FPS remedy data collection notes for completion](#)

[Age discrimination remedy data collection - Guidance for administrators and FRAs - version 2 clean](#)

It is the responsibility of the FRA to provide all the data required for WYPF to produce the DCU options for members but WYPF will populate the data collection template with any relevant data held on the members' pension record so that this can either be verified as correct or amended as appropriate. Work needs to be done by Civica, our software supplier before this template can be populated and sent out and it is hoped this will be available by the end of July.

#### Matthews

9. There is no update on this. The Home Office is consulting with their lawyers and the Fire Brigades Union (FBU) to finalise who will be 'in scope' for this exercise. A draft consultation is expected in the next few months, but a specific timeframe is

not available at the moment. It is likely that this exercise will run concurrently alongside work to address the age discrimination remedy.

Key Performance Indicators - 1 January 2021 to March 2021

10. The Table below details performance against each of the Key Performance Indicators for the period 1 January 2021 – 31 March 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	3	20	3	85	100	11.67
Change of Address	16	20	16	85	100	1
Change of Bank Details	6	20	6	85	100	2.67
Death Grant Nomination form	11	20	11	85	100	1.55
Death in Retirement	5	5	3	85	60	4
Deferred Benefits Into Payment - Payment of Lump Sum	1	3	1	85	100	2
Deferred Benefits set up on leaving	5	10	3	85	60	19.4
Divorce Settlement - Pension Sharing order Implemented	2	80	2	100	100	2.5
Enquiry Fire	1	10	1	85	100	1
General Payroll Changes	27	20	27	85	100	2.3
Initial letter Death in Retirement	5	5	4	85	80	4.4
Pension Estimate	23	10	21	85	91.3	5.3
Pension Saving Statement	1	20	1	100	100	1
Pension Set Up Payment of Lump Sum	5	3	5	85	100	1
Retirement Actual	5	10	5	85	100	1
Spouse Potential	2	5	1	85	50	18
Transfer In Actual	2	10	2	85	100	1

**Officers to Contact**

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