

Pensions Management Team Meeting

Cleveland Fire Brigade 2023



PERFORMANCE REPORT XPS - PENSIONS

1. Purpose

To provide a summary of the performance management meeting between XPS and Cleveland Fire Brigade, with reference primarily to quarter 1 of 2023/24.

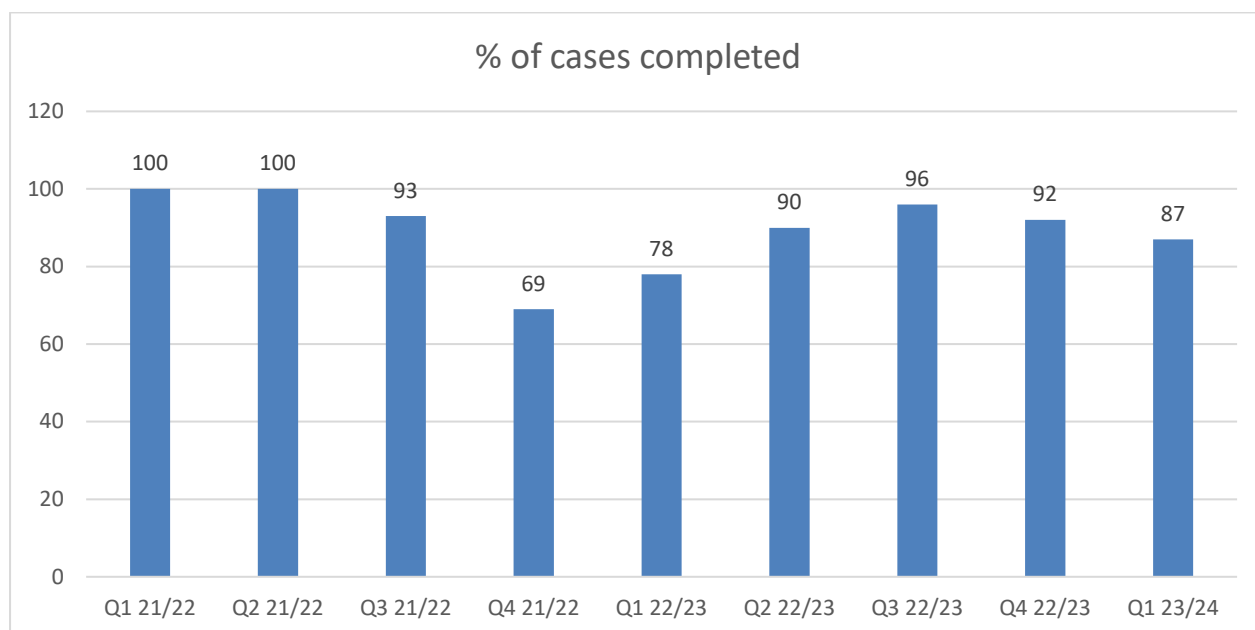
2. Background

Performance management meetings take place between XPS and the Brigade on a quarterly basis. XPS provide monthly and quarterly data which is cross referenced with the KPIs contained within the contract specification for presentation to the Pensions Management Team and CFB Pension Board.

3. Summary

For quarter 1 2023/ 2024 the compliance for cases is 87%.

The following graph illustrates the performance over the four quarters for 2021/2022, 2022/2023 and 2023/2024 for comparison.



Specifically, in quarter 1 there were 64 completed tasks with 8 cases being completed outside of the normal timeframes. For context the number of cases have increased by 25% from the last quarter. As such, these cases completed out with the timescales are of the same theme as the last quarter. To address this training is ongoing and a continual review of processes is supporting XPS with addressing any specific issues that address compliance. Details of the cases are below:

Month	Service	Detail
April	Death	This related to the closing of the admin record of a deceased member. There was delay in closing the payroll record, no overpayment, and the dependent's pension was put into payment on the next available payroll. No impact on payment.
	General	This was a request from a member of a breakdown of how their pension increase at age 55 had been calculated that took longer to respond to than normal. No impact on payment.
May	Estimate	An estimate request from the brigade. This was not set up properly upon receipt. Although the date quoted that was quoted to was far in advance there was a significant delay in sending these figures across. No impact on payment.
	Estimate	Two estimate requests for one member that were produced and sent outside of the KPI. No impact on payment.
	General	This was a request from a member for scheme rules in the event of a member remarrying that was responded to late. No impact on payment.
June	Deferred	Deferment of the 2015 record of a retiring 1992 member. Although there was a delay in this, the record was still updated and notification sent prior to the member leaving. No impact on payment.
	General	This related to the forwarding of a cheque in repayment of pension to the FRA. No impact on payment.
	Pension options	Pension options for a member of the 2015 scheme where the FRA advised us that benefits should exist as contributions had been taken, where we held an opt out record, so we issued them after the member became entitled. No response from the member to date.

4. Performance Against Key Performance Indicators

Performance Standard	Minimum Target	Notes - Performance against Standard	
Make payment on the due date	100%	Q1 2023– Confirmed	
Produce P60s to Pensioners in accordance with HMRC requirements and within statutory deadlines	100%	May 2023 - Complete	
Set up new entrant pension record within 10 working days and issue statutory notification within 6 weeks of the employment start date	100%	Q1 2023 - 100%	
Implement annual pension increases by payment due date	100%	May 2023 - Complete	
Calculate transfer values into the Authority within 10 working days of receipt of necessary documentation	100%	Q1 2023 - 100%	
Provide information on request in respect of Pension Sharing on Divorce within legislative timescales.	100%	Q1 2023 - 100%	
Implement Pension Sharing Orders within legislative timescales	100%	Q1 2023 - 100%	
Provide a statement of deferred benefit entitlement on leaving service within 15 working days of date of leaving or receipt of notification, whichever is later	100%	Q1 2023 – 86% 1 case out of 7 completed late	
Provide annual statement of benefit entitlement to active and deferred members within legislative timescales and in accordance with the deadline set by the Authority (31 st August)	100%	2022 statements issued by 31.8.22	

Where a Firefighters Pension Input Amount within the 'scheme' exceeds the Annual Allowance provide a pension saving statement by the 6 th October	100%	2022 statements issued by 6.10.22	
Respond to requests for estimates of benefits within 10 working days following receipt of request (subject to all necessary information being available). Members limited to a max of 3 estimates per year	100%	Q1 2023 - 67% 3 cases out of 9 completed late	
Maternity/ Paternity/ Adoption Leave: Update Firefighters pension record. If there has been any period where contributions have not been paid; recalculate the Notional Start Date. Notify Employer and Firefighter or revised Notional Start Date within 20 working days	100%	Q1 2023 - 100%	
For unpaid leave or Strike action update Firefighter's pension record and recalculate the Notional Start Date. Notify Employer and Firefighter of Notional Start Date within 20 working days	100%	Q1 2023 - 100%	
Payment of all retirement, injury and compensation benefits in accordance with legislation within 5 working days of receipt of notification of lump sum option from individual or date of entitlement to benefit; whichever is later. The Authority to receive commutation payment schedule 5 working days before retirement where relevant information is received.	100%	Q1 2023 - 100%	
Calculate and pay transfer value out within 10 working days of	100%	Q1 2023 - 100%	

receipt of necessary documentation.			
Queries logged with Pensions Helpdesk acknowledged within 10 working days	100%	Q1 2023 - 87% 3 cases out of 23 completed late	
Implementation of change in pensioner circumstance within 10 working days	100%	Q1 2023 - 100%	
Provide the appropriate calculations in respect of purchase of Additional Benefit within 20 working days of member request	100%	Q1 2023 - 100%	
Personal representatives to be contacted within 5 working days of receiving death notice. Pension payroll notified within 5 working days and death grant payment schedule to be sent to the Authority within 5 working days of receiving all relevant information. Also notify HMRC of deceased.	100%	Q1 2023 - 0% 1 case completed late	
Complete surveys, questionnaires and returns, including annual data collection for actuaries and Government Departments by relevant deadlines. Scheme Valuation – as requested National Fraud Initiative – due 2023 Freedom of Information Requests – as and when received	100%	All complete to date	
Regular management information within 5 working days of month end.	100%	All complete to date	
Respond to ad hoc queries from the Authority within 1 working day where the work involved will take less than 30 minutes to complete.	100%	Confirmed	
Notify the Authority of any errors caused by the Administrator or third parties as well as any complaints within 3	100%	Confirmed	

working day. Ensure investigation is completed in 5 working days and corrective action is taken after appropriate investigations within 10 working days.			
Provision of management information to update the Pension Board	100%	Complete	

4.1. Complaints

No complaints have been received for Q1 of 2023/ 2024.

5. Conclusion

With reference to Q1 of 2023/ 2024 KPI compliance is lower than that reported in Q4 of 2022/23 with a 5% decrease. However, the quarter represented a busier period than Q4 of 2022/2023 with a 25% increase in cases, with the types of cases that are being completed late of the same theme.

Through management contract meetings ongoing performance will be monitored and any areas of concern will be raised and discussed.