

LPB ACTION LOG - Open Actions

Action Ref	Date Raised	Source	Action Lead	Status	Pension Work Activity	Action	Comments	RAG
LPB089	02-Aug-23	Board	Mareena Anderson-Thorne	In Progress		Reporting of Breaches	<p>08/02/2023: MAT and ZS to identify and present breaches at next LPB meeting.</p> <p>06/04/2023: MAT and ZS to contact the pension regulator to try and set up an exchange account to be able to report breaches.</p> <p>04/05/2023: Exchange accounts have now been set up</p> <p>06/07/2023: Action to remain open. No breaches reported in current month.</p> <p>02/08/2023: No new breaches</p> <p>07/09/2023: No new breaches</p> <p>05/10/2023: No new breaches</p> <p>01/02/2024: No new breaches</p> <p>07/03/2024: No new breaches</p> <p>17/04/2024: No new breaches</p> <p>24/06/2024: No new breaches</p> <p>08/07/2024: No new breaches</p> <p>02/09/2024: One breach, ABS not issued. No need for the Service to report as WYPF had pre-emptively reported. DSFRS can now report if they wish to do so.</p> <p>11/09/2024: Action reviewed at LPB Meeting. RAG rating changed to Amber.</p> <p>28/10/2024: MAT received guidance (via email of 28/10/24) from Head of Governance @ WYPF (Matthew Mott) confirming that WYPF report the breach rather than DSFRS</p> <p>25/11/2024: No new breaches</p>	A
LPB091	21-Jun-23	Board	Mareena Anderson-Thorne	In progress		Revision of the training needs analysis New Board members to undertake TNA with MAT.	<p>06/07/2023: Ongoing, awaiting TNA for MP and Cllr Trail.</p> <p>02/08/2023: Ongoing. MAT to contact Cllr Trail.</p> <p>07/09/2023: Ongoing - awaiting confirmation of new Board members.</p> <p>06/12/2023: Training Needs Analysis to be completed by new Board Members (MS and SC)</p> <p>01/02/2024: ZS had a call with TPR regarding new code for new legislation that needs to be signed off. New Pension training is nearly complete and all Board members will be contacted to revisit training when appropriate.</p> <p>07/03/2024: New code had been launched, however, new TPR training packages not yet live.</p> <p>17/04/2024: Work ongoing.</p> <p>24/06/2024: Ongoing.</p> <p>08/07/2024: Ongoing, TNA and modules circulated to Board Members in May and June, recirculated following July Board meeting.</p> <p>02/09/2024: Ongoing. TNA received for MP, GW and SSR.</p> <p>11/09/2024: Action reviewed at LPB Meeting. RAG rating changed to Amber.</p> <p>28/10/2024: Awaiting member returns of training needs</p> <p>25/11/2024: As above.</p>	A

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LPB092	21-Jun-23	Board	Mareena Anderson-Thorne	In progress		Internal Resourcing SS to discuss internal resourcing requirements with MAT (relating to case administration and processing for McCloud/Saergant/Matthews)	<p>06/07/2023: The resourcing requirements for administration of the McCloud/Saergant/Matthews cases had increased, further resourcing was required by MAT and ZS imminently. Internal options for resourcing to be explored. MAT and ZS to provide short description of role requirements to SS.</p> <p>02/08/2023: Additional support resourcing sought for the data file work. Matthews work still required additional resourcing. Internal resourcing reached further than the McCloud/Saergant/Matthews work, including level of knowledge base, impact of additional responsibilities and changing capacities. Short term resourcing support had been sought within the finance department, this would not be a sustainable longer term solution.</p> <p>07/09/2023: A number of colleagues from the Finance department had assisted in checking the data file. The work required needed to be done manually and would be a lengthy process. A significant factor for the lengthy process is the complexity of the data and the discrepancies arising in the calculations. The data discrepancies had arisen through changes made to allowances, changes in ruling and changes to the pensions administrator. Each case takes a number of hours to administer. When all avenues for managing had been exhausted MAT and ZS would discuss acceptable discrepancy figures with SS.</p> <p>06/12/2023: The Service was looking to obtain additional administrative support on fixed term contract basis to assist with significant workload (immediate detriment etc.). The recruitment for a replacement Pensions Officer was ongoing. In light of these issues, it was agreed to increase RAG rating to amber. WYPF considered it was adequately resourced until 2025 but had a constant process for recruitment and training;</p> <p>01/02/2024: One additional staff member assisting with the workload.</p> <p>07/03/2024: Service would be looking to obtain additional fixed term staff, three additional staff members approved (07/03).</p> <p>17/04/24: Two new starters were anticipated to join the HR team at the end of April 2024. Considerable concerns remained with team resilience and capacity due to limited resourcing.</p> <p>24/06/24: Two new starters joined the Service in May commencing work on Matthews cancellations, this provider an increased level of assurance that resource heavy work was underway. Notwithstanding the recruitment, resourcing remained an area of concern in light of other increased areas of Pension work expected.</p> <p>08/07/2024: Two staff members appointed. Pensions Lead role recruited to with the expected new joiner anticipated to join in September. Action to remain open to monitor capacity and impact.</p> <p>02/09/2024: Resourcing remained a significant concern, opportunities being explored internally to support. A key member of staff had been unavailable impacting work progress, further update would be provided when available.</p> <p>11/09/2024: Action reviewed at LPB Meeting.</p> <p>28/10/24: New staff in place, new pensions lead in place. Still able to process immediate retirements.</p> <p>25/11/24: Still processing immediate retirements. Challenges around new appointments.</p>	A
LPB094	28-Oct-24	LPB Monthly	Mareena Anderson-Thorne & Tamsin Ingles	In Progress		Recruit Scheme Member Representatives (JL and BR term ended)	<p>28/10/2024: MAT/TL to place advert by December's quarterly meeting with view to appointing in the New Year</p> <p>25/11/2024: MAT to put in ShoutOut.</p>	A
LPB095	02-Dec-24	FPS Bulletin 87	Maria Phillips	In progress		Consider providing a response to the consultation on Amendments to The Firefighters' Pension Scheme Regulations 2014, by 29th January 2025		
LPB096	02-Dec-24	FPS Bulletin 87	Maria Phillips	In progress		Consider attending the Local Pensions Board Chairs Forum, 6th Feb 2025		
LPB097	02-Dec-24	FPS Bulletin 87	Maria Phillips	In progress		Consider, at March 2025 LPB meeting, if the LPB is/should be monitoring the "Age Discrimination remedy - request for data"		
LPB098	02-Dec-24	FPS Bulletin 87	Maria Phillips	In progress		Consider providing a response to the Government's 2024 Budget announcements		

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LPB099	17-Jan-25	WYPF Jan 2025 monthly report	Mareena Anderson-Thorne & Tamsin Ingles			<p>Scheme managers should ensure that they have updated the new NS&I rate in the calculator for calculations on or after 20 December 2024.</p> <p>Administrators should ensure that the correct NS&I rate is quoted in their figures to members and administrators who use Heywood as their software supplier should liaise with the scheme managers on how the new interest rates will be recalculated outside of the software.</p>		
LPB100	17-Jan-25	WYPF Jan 2025 monthly report	Mareena Anderson-Thorne & Tamsin Ingles			<p>Reference ABS - Remedial Service Statements WYPF says: As it is not yet confirmed what will be the exact date of ABS-RSS distribution we would suggest all FRAs use 28 February 2025 is used. Where an election is made and contributions/refund due, a further calculation will need to be performed by the FRA.</p>		
LPB101	17-Jan-25	WYPF Jan 2025 monthly report	Mareena Anderson-Thorne & Tamsin Ingles			<p>Reference ABS - Remedial Service Statements WYPF says: we are considering a communication members and notify FRAs who the members are and why. This can only be done once we know who will receive and ABS and when.</p>		
LPB102	17-Jan-25	WYPF Jan 2025 monthly report	Mareena Anderson-Thorne & Tamsin Ingles			<p>NS&I Direct saver Interest Rates: Scheme managers should ensure that they have considered these readiness questions and discussed the relevant points with their administrator. Administrators should ensure that they are prepared and have discussed the relevant points with their clients and communicated appropriately with members.</p>		