

Report Addendum

01.01 KPI Reporting – Accuracy and Qualitative Reporting

At the meeting on 22nd November 2018, it was raised that the client report provided to the Pension Board provided details of XPS Administration achievement against the Service Level Agreements; this was in compliance with the targets set within the contract between the Fire Authority and XPS Administration.

As mentioned at the meeting, these statistics may show that XPS Administration are complying with the contractual requirements but member's may not receive the level of service they would normally expect (e.g. benefits are quoted incorrectly or time taken to collate all information is significantly longer than the SLA target).

As a means of combatting this, XPS Administration are looking to provide additional reporting to highlight all work that is held in their system. The intention is to start reporting:

- Outstanding cases at month end
- Cases due in month
- Due cases completed during month
- Due cases completed inside target
- Due cases completed outside target
- Due cases completed <5 days outside target
- Outstanding cases at month start completed
- Total outstanding cases at month end
- Average days to complete
- Due cases: 5 within target

Although this will not fully meet the qualitative part of the original request, XPS Administration believe that it will provide a better overview of the work within the administration system and highlight any areas that may be causing problems. This will include all request cases so the Pension Board, and the Fire Authority, can see if there are delays in the provision of information (whether internally or via outside parties).

With regards qualitative measures, XPS Administration believe that the reporting of complaints will highlight any areas of concern. Recalculation of benefits discovered at the checking stage would not be a good barometer of quality due to this being affected by training of new staff on different processes.

01.02 2017/18 Annual Benefit Statement Issuance

Following the issuance of the 2017/18 Annual Benefit Statements (ABS) by XPS Administration, Kier Pensions Unit at that time, it transpired that 36 ABS's were not issued; this covered 31 members.

Following an investigation into the members that did not receive an ABS they were split into the following groups:

- 1 related to a Modified Retained Firefighter who required a manual calculation. The ABS had been issued separately which the report did not pick up
- 10 records had issue with data held (e.g. no CARE contributions, CARE data on the final salary record). These are being investigated further.
- 19 had multiple (3 or more) records which caused issues with our system. This is being investigated further.
- 6 were not due an ABS. They were a mixture of leavers prior to the issuance of the ABS or, by our records, a 2018/19 scheme joiner.

01.03 Transfer To XPS IT Infrastructure

Following the sale of the Pensions Unit by Kier to XPS Administration on 1st November 2018, there was an IT Technical Service Agreement (TSA) in place, whereby the Middlesbrough office would continue to be hosted by Kier IT for a period up to 6 months.

During the weekend of 30th March the IT infrastructure moved to XPS, with the pension administration now being hosted by the software suppliers. This is expected to provide greater flexibility and stronger Business Continuity and Disaster Recovery procedures than under Kier.

The next stage is to transfer the BACS Bureau. The first stage has just been completed whereby we are now paying benefits via the BACS solution within XPS. This will change again later this year when a new BACS server is brought online once the BACS audit of it has been completed (expected in the next few months).