

WEST MIDLANDS FIRE AND RESCUE AUTHORITY

PENSION BOARD

20 JULY 2017

PENSION SECTION SUPPORTING INFORMATION

1. WEST MIDLANDS FIRE SERVICE FIREFIGHTERS' PENSION SCHEMES MEMBERSHIP AS AT 31st MAY 2017

Scheme	Actives	Deferred	Pensioners (Including Dependants)
1992	353	239	2,524
2006	9	166	3
2015	917	8	
Modified	3	1	3

2. ANNUAL ACTIVITY LEVELS

2.1 During the last twelve months (01/06/2016 to 31/05/2017) the following levels of activity have been experienced:-

Age Related Retirements	64
Ill Health Retirements	3
Opt outs	18
Other leavers	23
New joiners	1
Applications to transfer in/out	27
Inter-brigade transfer requests processed	11
Cash transfer payments made	1
Transfers not completed	12

- 2.2 The section has also processed the requests shown in the table below and achieved the levels of performance shown.

Request type	Received	Responded to	Average Response time (days))
Benefit Estimate	85	131	155
CETV for Divorce	20	28	137
General Information	140	187	183

The number of cases responded to includes a sizeable number of cases which were received prior to 1st June 2016 but not responded to until the year being reported. This has led to the average response time being higher than the 92 day target.

3. **RISK REGISTER**

No updates have been made to the Risk Register since the last Pension Board meeting.

4. **ANNUAL BENEFIT STATEMENTS**

- 4.1 Annual Benefit Statements are due to be issued by 31st August 2017. At the current time the section expects to meet these deadlines.

5. **INTERNAL DISPUTE RESOLUTION PROCEDURE (IDRP)**

The dispute reported at the last Pension Board meeting went to appeal and the Committee upheld the decision of the Deputy Chief Fire Officer. The member now has the option of taking his complaint to The Pension Ombudsman.

6. **OPT OUT LEVELS AND REASONS**

West Midlands Fire Service has experienced the levels of Opt outs shown in the following table during the period 1st June 2016 to 31st May 2017.

Month	1992 Scheme	2015 Scheme	Total	Primary Reason if known
June 16				
July		1	1	
August			1	
September			1	
October	1	2	3	92 Member opt out to take benefits as he had reached age 60
November		2	2	
December		2	2	
January 17	1	1	2	92 Member opt out to take benefits as he had reached age 60
February		4	4	
March		1	1	
April		1	1	
May		2	2	

Anecdotal the reason for opting out appears to be cost. Of those opting out of the 2015 scheme 7 were previously members of the 2006 scheme, 6 had membership of the 1992 scheme, 2 members had been automatically re-enrolled, and 1 had chosen to re-join but subsequently opted out again.

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Payroll and Pensions Manager