



Department
of Health &
Social Care

NHS Pension Board summary of minutes: 9 February 2023

Published June 2023

Administrator Data and Key Performance Indicator (KPI) Performance

An overview of the KPIs and administrator performance data was provided.

It was reported that KPIs were failed for:

- Child Allowance due to administrator error, which is being addressed; and Revised Payments due to 20,000 sub awards received as a result of the retrospective pay wards, on track to recover in January 2023:
 - Child Allowances – 82.02% against a KPI of 95%
 - Revised Payments – 41.91% against a KPI of 70%.

Quality Assurance – it was reported that KPI was exceeded throughout the quarter.

Complaints and Internal Disputes Resolution (IDRs) – the number of complaints and disputes had reduced to 171 in the quarter, 304 were cleared in the quarter.

Pension Ombudsman cases – there were two cases:

- One was upheld against the Trust, not BSA:
 - The member complained that the Trust failed to action an Additional Pension request but had deducted pensions contributions; the Trust failed to act on the original request and failed to act when advised by BSA. The Trust was directed to pay £1000 and to liaise with BSA to establish the cost of retrospectively allowing the AP purchase.
- The second was partly upheld:
 - The member had received a higher estimate of benefits but her actual benefits were lower than expected; it was found that BSA did not notify the member of the lower pensionable pay amount to give her the opportunity to reconsider her retirement options; £250 to be paid as recompense; the member had received previous estimates so the PO did not consider it reasonable that she wholly relied on the higher one to make her retirement decision.

Breaches of Law – there were two Breaches of Law:

- Annual TPR – unable to provide 100% ABS.

- Failure to implement a Pensions Sharing Order within the specified timescale – no further action.

Business Improvement Initiatives

A presentation was provided of the Business Improvement Initiatives, noting that:

- There is a focus on improving customer service.
- Work has been completed on Estimates, Bereavement recovery, Subs recovery, Service and Life Events.
- Work Manager has been introduced into Complaints and Disputes, Technical Consultant Team and Annual Allowance.
- The team are looking at Customer Service Standards to improve operational turnaround time. BSA are working towards the Contact Centre and Service Delivery in Pensions becoming one entity, which provides benefits in terms of a career path to pensions administration for CCS staff.

Compliance Report

It was reported that there have been three reviews:

- Pension Credit Benefits – satisfactory
- CETV 1995/2008 cases – moderate
- Implementation and discharge of a PSO product review – moderate

There have been recommendations implemented in:

- NHS Pension Recharging
- Protection of Pay Casework
- Protection of Pay Products

Member Communications

Details were shared re internal BSA communication activities:

- Member events
- GP member events and engagement
- Employer events
- End of Covid Act
- Guidance for copying members into emails
- Member research on Opt Outs – contacted those who have opted out; what could make them stay/benefits
- Member contributions and other disclosure letters.

0.5M disclosure letters were sent on 19 January and the CCS response rate was 0.34%, which is very low, which could indicate that the letters were being read and understood or ignored but the URL provided in the letter is being used.

A presentation was provided on McCloud User Research outcomes.

Update on New Regulations, Guidance or Consultations

Updates were provided on:

- McCloud issues
- Consultation on Flexibilities
- Retirement flexibility
- Scheme Access PCN

Responses to the consultation on partial retirement and retire and return plus the CPI fix had been positive and DHSC expected to progress these measures from 1 April 2023 except for partial retirement, which would be implemented from October 2023.

The McCloud remedy consultation was on track to be published in March.

Deep Dive Presentations

The following Deep Dive presentations were provided:

- Benchmarking output - comparative analysis of pension schemes provided by John Simmonds, CEM Benchmarking
- Directions Update provided by Elizabeth Chapman, Operations Manager, NHS Pensions
- Pension Fraud Risk provided by Lisa McAlister, Counter Fraud Manager, NHSBSA
- The Pensions Ombudsman (TPO) Deep Dive provided by Rebecca Orr and Mairi Dearden, TPO

© Crown copyright 2023

www.gov.uk/dhsc

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit nationalarchives.gov.uk/doc/open-government-licence/version/3.

Where we have identified any third-party copyright information you will need to obtain permission from the copyright holders concerned.

OGL