



Department  
of Health &  
Social Care

# **NHS Pension Board summary of minutes: 16 November 2023**

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# **Administrator data and key performance indicator (KPI) performance**

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

It was reported that KPI for first awards was narrowly missed due to skill shortage in the Practitioners Team, which has been addressed with 12-week training using an external resource.

Child allowance KPI failed in July and August, affecting a small number of families; inexperienced administrators were waiting for information that was not needed and/or waiting for or already had. Weekly spot checks have been introduced to make sure that cases are correctly pended. These cases are complex if there are multiple children in multiple families.

Revised payment failed in July but was achieved within 3 days; 4,000 sub-awards were received on the same day. There is an action plan to clear the backlog.

Quality – passed KPI throughout the reporting period.

Complaints and disputes – the team have been concentrating on clearing IDR1/2s. It was noted that there has been an increase in the volume of complaints. Looking at root causes, the majority are 'process not followed' but most related to second bite PI cases. The backlog in complaints is being worked through.

Pensions Ombudsman – none upheld/partially upheld.

Breach of Law (BoL) – BoL submitted as NHSBSA were unable to provide 100% of ABS; TPR responded that the BoL was noted; information was included in the meeting papers.

## **Business improvement initiatives**

It was noted that the Customer Feedback and Improvement Team (CFIT) are working on the website, going through documents for improvement.

## **Compliance report**

Recommendations were implemented on:

- NHS Pensions re-charging

- protection of pay
- PSO products review
- PSO case review
- additional pensions case review

It was noted that the last 2 reviews were unsatisfactory in the quarter.

## **NHS Pensions Service Delivery update and opt out tool**

Chris Calise provided an update on the internal restructure of the NHS Pensions service and the Data Analytics Learning Laboratory (DALL) Team gave an update on the new opt out tool.

## **Update on new regulations, guidance or consultations**

Updates were provided on:

- McCloud
- pensions dashboard and opportunities
- tax compensation – challenges with guidance from HMRC/HMT. Re people asking for compensation for contingent decisions, they will not know until they know what the decisions are
- partial retirement – there was some discussion about partial retirement, it was hoped that, in the next month or so, people will be much more aware and will take their pensions and carry on working
- consultation re contribution rates – awaiting views of Scheme Advisory Board (SAB), if to be re-valued by CPI, full regulations would be needed every year. There will be issues with fiscal drag

# Deep dive presentations

The following deep dive presentations were provided:

- data quality deep dive presentation, provided by Joanne Fletcher, NHSBSA Data Manager
- NHSBSA Workforce Directorate update, provided by Chris Calise, Head of Service, NHS Pensions Service, on behalf of Alison O'Brien, NHSBSA Associate Director for Workforce

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