

# *FINANCE & PROCUREMENT*

## **FUNCTIONAL PLAN**

### **ACTION TRACKER 2025/26**

#### **Our Purpose:**

HERE TO SERVE. HERE TO PROTECT.

HERE TO KEEP YOU SAFE.

## Action Plan 2025/26

KEY DELIVERABLE	ACTIONS TO ACHIEVE EXPECTED OUTCOMES	CONTRIBUTION TO PURPOSE/AIMS. Responsible Officer	PROGRESS	Does this contribute to CRMP, HMI or Fire Standards Implementation actions (please state which)?	TARGET DATE	BOARD REPORT DATE	BRAG STATUS
<b>1.To liaise with the Local Government Association (LGA) and the Local Pension Partnership Administration (LPPA) key contacts to ensure all members impacted by the public pension age discrimination cases are resolved and the “remedy” is agreed by the deadlines set out by the Home Office.</b>	1.1.1 MFRS staff continue to liaise with and provide all the necessary information to therefore enable the LPPA to ensure all “remedy” cases are resolved as per the Home Office deadlines.	Director of Finance & Procurement / Head of Finance	<p><b>Q1 Update</b></p> <p>The Local Pensions Partnership Administration (LPPA) continue to pay all MFRS retirees’ commutations within the SLA guidelines of 10 working days of retirement. MFRS staff worked with LPPA staff during Q1 to ensure all data requirements were met relating to the ‘remedy’.</p> <p>LPPA have confirmed that there will be a slight delay to the original timeline for payment of adjusted benefits whilst they work through some system developments with the application provider. LPPA are working closely with their provider to process these payments as quickly as possible. The timescale for payments will be September – November 2025. LPPA will continue to keep members updated. Members will receive a communication from the LPPA to provide reassurance that existing pensions will continue to be paid as normal and that any outstanding payments and interest on their pension and lump sum arrears will be calculated and included up to the date when payment is made.</p> <p>MFRS staff are working with the LPPA to ensure members receive their updated</p>	No – not directly	April 2025 – March 2026		

pensions documentation as soon as reasonably practicable.

**Q2 Update**

The Local Pensions Partnership Administration (LPPA) continue to pay all MFRS retirees' commutations within the SLA guidelines of 10 working days of retirement. MFRS staff worked with LPPA staff during Q2 to ensure all data requirements were met relating to the pension's 'remedy'.

LPPA have confirmed that there will be a delay to the original timeline for payment of adjusted benefits whilst they work through some system developments with the application provider. LPPA are working closely with their provider to process these payments as quickly as possible. The timescale for payments will be from 30<sup>th</sup> of November for Immediate Choice Remedial Service Statements (ICRSS) payments, 31<sup>st</sup> March 2026 for Ill health cases and the 30<sup>th</sup> of June 2026 for ICRSS Bereavement cases. The LPPA will continue to keep members updated. Members will receive a communication from the LPPA to provide reassurance that existing pensions will continue to be paid as normal.

MFRS staff are working with the LPPA to ensure members receive their updated pensions documentation as soon as reasonably practicable.

<p><b>2.The Government Pension’s Dashboard scheme is an initiative to deliver digital services (Apps / Websites) which will enable savers to be able to view their pension information in one place. MFRS will need to ensure all data is cleansed and up to date for all members of its pension schemes to enable the Firefighter pension administrator (LPPA) and Merseyside Pension Fund (MPF) to deliver this facility.</b></p>	<p>2.1.1 Ensure all applicable data which is required for the eco-system to be established ahead of the dashboard implementation is provided to the LPPA and MPF respectively for Grey, Green and Red Book members.</p>	<p>Director of Finance &amp; Procurement / Head of Finance</p>	<p><b>Q1 Update</b>  The Pensions Dashboard Programme is a government initiative which will allow members to access information from all pension providers (including the state pension) in one place, through a secure on-line platform.</p> <p>MFRS have provided all pension scheme connection codes to the Local Pension Partnership Administration (LPPA) ahead of the 30<sup>th</sup> of June deadline.</p> <p>A specific item relating to the Pensions Dashboard programme is included on the MFRS Pensions Board to ensure monitoring and compliance with the requirements and deadline.</p> <p>MFRS Finance staff attend regular progress sessions arranged by the LPPA. The current pensions dashboard is RAG rated as green by the LPPA and the initial connection deadline of the 31<sup>st</sup> of October 2025 is expected to be delivered.</p> <p><b>Q2 Update</b>  The Pensions Dashboard Programme is a government initiative which will allow members to access information from all pension providers (including the state pension) in one place, through a secure on-line platform.</p> <p>As per the Q1 update, MFRS have provided all pension scheme connection codes to the Local Pension Partnership Administration (LPPA) ahead of the 30<sup>th</sup> of June deadline.</p>	<p>No – not directly</p>	<p>October 2025 – March 2026</p>		
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			<p>A specific item relating to the Pensions Dashboard programme is included on the MFRS Pensions Board to ensure monitoring and compliance with the requirements.</p> <p>During September 2025, LPPA have informed all their clients that due to an unexpected issue the connection to the Pensions dashboard is at risk ahead of the connection deadline of the 31<sup>st</sup> of October 2025. The issue is being dealt with as a matter of urgency to ensure it is resolved as quickly as possible; the expectation is that connection will be implemented in the weeks following the deadline.</p> <p>The Pensions Regulator (TPR) have advised that this is not determined as a breach for pension funds, but MFRS finance staff did ensure TPR were notified of the delay as per above.</p> <p>The Regulator has responded saying they do not intend to take regulatory action if the scheme cannot connect by your “connect by” date because due to MFRA using one of the Pension Dashboards Programme’s volunteer participants as its Integrated Service Provider and the Integrated Service Provider has started but not yet completed connection to the system.</p>				
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<p><b>3. Carry out an upgrade to the financial management information application from the current 5.5 version to the latest 6.5 version.</b></p>	<p>3.1.1 To work with the finance application provider (One Advanced) to carry out the upgrade to the latest version as efficiently and effectively as possible with minimal disruption to users of the application.</p>	<p>Director of Finance &amp; Procurement / Head of Finance / FIMA Manager</p>	<p><b>Q1 Update</b>  Since April 2025, a number of demonstration sessions have been held with staff from the application provider (One Advanced) and key users in MFRS.</p> <p>A cost / benefit analysis decision will be required in September to determine if the service deems it to be beneficial at this time to move to the new version of the application (called Financials). Once a decision has been made, the service will then progress to either the new Financials platform or revert to carrying out the upgrade to version 6.5 of the current E-Financials version of the application.</p> <p><b>Q2 Update</b>  As per the Q1 update, since April 2025 several demonstration sessions have been held with staff from the application provider (One Advanced) and key users in MFRS.</p> <p>A cost / benefit analysis decision meeting with key stakeholders has taken place to determine if the service deems it to be beneficial at this time to move to the new version of the finance application (called Financials).</p> <p>MFRS key stakeholders and the account director from One Advanced have arranged to meet in November to review upgrade options. Once a decision has been made, the service will then progress to either the new Financials platform or revert to carrying out the upgrade to version 6.5 of the current E-Financials version of the application.</p>	<p>No – not directly</p>	<p>April 2025 – March 2026</p>	
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<b>4.Following the move to a new HR &amp; Payroll Human Capital Management (HCM) application during 2024/25, it is now key to ensure the suite of management reports are built within the application these include monthly pension reports required for internal and external reporting purposes.</b>	4.1.1 To assess the current suite of reports and then develop suitable management reports from RRS to meet our internal and external reporting requirements.	Director of Finance & Procurement / Head of Finance	<p><b>Q1 Update</b> Following the move to the new HR and Payroll application during 2024/25, the Finance team have been working with the application provider to build and develop suitable pensions, payroll and expense reports. In liaising with application provider, two key pension reports required for both Grey and Green/Red book pension schemes have now been developed and have proved to be essential in the ensuring statutory returns required for the Local Pensions Partnership Administration (LPPA) and Merseyside Pension Fund (MPF) have been completed.</p> <p>The team are now in the process of assessing if any other management reports would be required in the second half 2025/26.</p> <p><b>Q2 Update</b> Following on from the successful implementation of pensions reports as referred to in the Q1 update, the team are now looking for improvements required around expenses reporting during the second half of the financial year.</p>	No – not directly	April 2025 – March 2026		
<b>5.Using the experience gained during 2024/25 from the new electronic FS30 overtime claim forms, evaluate the benefits of further payroll automation during 2025/26 (for</b>	5.1.1 Evaluate the learning from the new electronic FS30 overtime claim forms with a view to assessing the requirement to rollout further automation of other payroll related forms.	Director of Finance & Procurement / Head of Finance	<p><b>Q1 Update</b> Following the introduction of the electronic overtime claims process delivered in 2024/25, the finance team are now reviewing other opportunities for further automation of payroll processes. These will be carried out during the second half of the financial year and will include potential reviews of the new starter form checklist, retained overtime payments and detached duty overtime payments.</p>	No – not directly	April 2025 – March 2026		

example - New starter checklist / other claim forms).			<b>Q2 Update</b> As per the Q1 update, the expectation is that a review of several payroll processes will be carried out during the second half of the financial year. These will include potential reviews of the new starter form checklist, retained overtime payments and detached duty overtime payments.				
<b>6.Provide a review of MFRS Statement of Accounts, with the aim to improve the format and layout of the statements (as far as possible whilst ensuring they accord with the Code of Practice on Local Authority Accounting in the UK).</b>	6.1.1 To carry out a review of the MFRS Statement of Accounts to ensure the format and layout are as user friendly as possible (as far as possible given they must meet the Code of Practice on Local Authority Accounting in the UK). The accounting team will conduct a sample review of other FRA’s Statement of Accounts during 2025/26 to assess if any improvements can be made.	Director of Finance & Procurement / Head of Finance / Financial Accountant	<b>Q1 Update</b> During Q1, key members within the Accounting Team have completed the draft Statement of Accounts as per the statutory deadline of the 30 <sup>th</sup> June 2025.  The team have reviewed the layout of the accounts and made them as user friendly as possible, whilst ensuring that they still comply with the Code of Practice on Local Authority Accounting in the UK. The team conducted a sample review of other Fire Authority Statements of Accounts to inform style and format changes to the MFRS accounts production.  In addition, the team have also streamlined a number of working papers which will be provided to the external auditors (Forvis Mazars) as part of the external audit process for the Authority’s Statement of Accounts.  <b>Q2 Update</b> Action complete.	No – not directly	April 2025 – March 2026		



7.The Procurement team will work to transition to the new Procurement Act which went live in February 2025 whilst maintaining contracts as awarded under previous legislation.	7.7.1 Implement and Embed new Contract Standing Orders.	Head of Procurement	<b>Q1 Update</b> The financial threshold has been amended in the finance application and in the exemptions procedure to align with the new Contract Standing Orders. An alerting message has been added in the finance application such that when expenditure approaches the threshold, the application generates a warning to the procurement mailbox.	No – not directly	April 2025 – March 2026		
	7.7.2Review New Contract Standing Orders.		<b>Q2 Update</b> The Procurement Department is in the process of providing additional training to budget managers for the updated Procurement Act.				

8.Commence procurement activity for the replacement Long Term Capability Maintenance contract.	8.8.1Recruit and embed Staff and Start Exit and Transition Phase.	Head of Procurement	<b>Q1 Update</b> Job Profile and Person Specification has been written for the new post of Procurement Lead. The Job Profile has undergone its first iteration of Job Evaluation.	No – not directly	April 2025 – May 2025		
	8.8.2Complete exit and Transition Phase.  8.8.3Start Design and Development Phase		<b>Q2 Update</b> Procurement Lead post has completed job evaluation and request to recruit stages. The post has been advertised and applications received and reviewed. Suitable candidates have been invited to interview.				

#### Staff Survey 2024 Action Plan

*Do you have any updates on the actions contained in the Staff Survey 2024 Action Plan, please report below:*

Action Area	Activity	Q2 update	Action Owner	Outcomes

<p><b>1. Staff Survey outcomes</b></p>	<ul style="list-style-type: none"> <li>Disseminate results of 2024 survey to staff through SLT who then can take any appropriate action</li> <li>Feedback to staff via Hot News and the portal</li> <li>Conduct further research into areas of the staff survey with a negative score of 20% or more and feed the findings into the engagement strategy and communications plan</li> <li>Learn from other departments and implement any necessary changes</li> <li>Initial resulting actions:</li> <li>Consider staff survey results/feedback in all planning and reviewing processes</li> <li>Increase awareness and staff engagement with members of Merseyside Fire and Rescue Authority in response to staff survey results/feedback</li> <li>Use themed pulse surveys to explore specific areas</li> <li>Increase the promotion of the survey in an attempt to increase the level of response in 2026 – consider launch event</li> <li>Consider alternative methods of gathering feedback about staff engagement</li> </ul>	<p>The Finance and Procurement team has initiated a series of discussions during both managers' meetings and team meetings to review and respond to the recent staff survey results. These conversations aim to understand key feedback, identify areas for improvement.</p> <p>Finance and Procurement managers continue to actively promote the benefits and positive outcomes of the recent staff survey. By highlighting key insights and demonstrating how feedback is shaping improvements, they aim to reinforce the value of participation and encourage ongoing engagement.</p>	<p>All SLT</p> <p>All SLT via S&amp;P</p> <p>All SLT</p> <p>All SLT</p> <p>All SLT with Legal and Dem Services as required</p> <p>All SLT via S&amp;P</p> <p>S&amp;P</p>	<p>Action will be taken to address areas for improvement and positives arising from the survey will be strengthened.</p> <p>Improved response rates in the 2026 survey.</p> <p>Improved results in 2026 for lower scoring areas in 2024.</p>
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			All SLT	
<b>2. Staff Engagement and Communications</b>	<ul style="list-style-type: none"> <li>Functional leaders will discuss the findings of the survey with their staff through normal meeting and engagement channels, to gather more details about the areas of the survey that achieved the lowest scores (the “lowlights”) and those that gained the highest results (the “highlights”) to learn from good practice and implement change where required.</li> </ul>	The Finance and Procurement team has initiated a series of discussions during both managers’ meetings and team meetings to review and respond to the recent staff survey results. These conversations aim to understand key feedback, identify areas for improvement.	All SLT	It is expected that engaging in this way through normal channels, but about specific staff survey outcomes, will be a sustainable way of maintaining the staff survey conversation and improving outcomes as a result.
<b>3. Organisational learning and shared good practice</b>	<ul style="list-style-type: none"> <li>Where good examples of engagement (on an individual, team or Service level) are identified, ensure these are written up and communicated to all to ensure the spread of good practice.</li> <li>A review of the governance of organisational learning is already contained within the 2025/26 Service Delivery Plan.</li> </ul>		<p>All SLT</p> <p>S&amp;P with SLT</p>	All staff will benefit from good practice as it is identified and shared within the Service.
<b>4. Recognition and Reward</b>	<ul style="list-style-type: none"> <li>Ongoing work within the People Plan will support recognition and rewards approaches that will have a positive impact on engagement.</li> </ul>		POD with SLT	Existing planned work will have a benefit in relation to staff engagement.
<b>5. Learning and Development</b>	<ul style="list-style-type: none"> <li>Ongoing work within the People Plan will support learning and development approaches that will have a positive impact on engagement.</li> </ul>		POD with SLT	Existing planned work will have a benefit in relation to staff engagement.

BRAG Descriptor				
Action completed	Action is unlikely to be delivered within the current functional delivery plan	Action may not be delivered by the designated deadline within the functional plan	Action will be delivered by the designated deadline within the functional plan	Action not yet started

STATUS SUMMARY – 30.9.25	
Total Number of Workstreams	8 (100%)
Action completed	1 (12.5%)
Action is unlikely to be delivered within the current functional delivery plan	0 (0%)
Action may not be delivered by the designated deadline within the functional plan	1 (12.5%)
Action will be delivered by the designated deadline within the functional plan	6 (75%)
Action not yet started	0 (0%)