

Pensions Administration Report

Contact Officers

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Papers with this report

KPI report

SUMMARY

This report is for information and provides an update on the administration of the London Borough of Hillingdon Fund of the LGPS, both in relation to Surrey and internally at Hillingdon.

Attached to the report is the latest KPI Report from Surrey CC.

RECOMMENDATION

It is recommended that Pensions Committee note this report.

INFORMATION

Surrey Administration Update

As reported previously to Committee, the Pension Administration system used by Surrey - Altair - includes a sophisticated task management system which allows the progress of all case work to be managed and monitored on a daily basis. The Key Performance Indicators (KPIs) against which Surrey are being monitored were all contained within the agreed Section 101 agreement. The latest report is attached.

There have been considerable improvements to quality of the data held by Surrey, and this has been reflected by the relatively small number of queries received regarding the information contained in the Annual Benefit Statements, sent out in August and September. Surrey sent out 89% of active members statements before the 31st August deadline, and a further 5% were sent out in early September. As at 24th November all statements where complete information is held have now been sent. The remaining statements cannot be sent out until information from the member's employer has been received. This represents 120 members who have not received a statement.

When the annual benefit statements were sent out, details of how members can register for "Mypension" were included, which is the online tool for members to access their own record. As at the end of September, over 15% of the active membership had applied for access. Further communications are planned for early in the New Year, to encourage more members to sign up, as in future hard copies of benefit statements will not be available. As a result of this change, the plan is to have electronic benefit statements available to scheme members by the end of July 2018, and by the end of May in future years. Accessibility to "Mypension" will be rolled out to pensioner

members from February 2018 when they receive communication of their annual pension increase, and deferred members from April 2018.

Key Performance Indicators for October to 24 November 2017.

Having compared the information supplied, the overall percentages on most areas have improved since the last KPI Report was provided to Committee. Problems still exist as a result of having to correct data supplied by Capita. The major detractor affecting Spouses Benefits is due to Capita not holding this information on their system, and benefits having to be re-run by Surrey to create a Spouses Benefit. The in-house team are helping Surrey re-create these records. A concern regarding the under-performance in the area of acknowledging Death Notifications has resulted in Surrey introducing a new process to ensure that all future cases are dealt with within the agreed time frame. Overall, we are still working with Surrey to improve performance towards 100% in each work area

Hillingdon Process update

The in-house team have continued to update and amend records as part of the overall data cleanse. It has been agreed with the Scheme Actuary, that a test valuation will be run in July 2018 to ascertain the quality of the data. This will help identify what, if any data is missing or incorrect and may affect the next whole scheme Valuation due as at 31 March 2019.

At the regular quarterly meeting held with Surrey, a number of items were discussed to help improve the quality of data held, and to ensure that data held is up to date. This includes contracting to a Mortality Screening body, who will run monthly checks against the pensioners payroll, to identify possible un-notified death cases, and also a tracing service, to help trace former scheme members who there is no address held on file. Currently, there are almost 500 members with a deferred entitlement where no address is held on file.

FINANCIAL IMPLICATIONS

There are no financial implications within this report.

LEGAL IMPLICATIONS

There are no legal implications within this report.