ADMINISTRATION REPORT

Committee	Pensions Committee

Officer Reporting	Sian Kunert, Finance Seby Carvalho, Finance

Papers with this report	KPI Report Draft Data Improvement Plan

HEADLINES

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 County Council (SCC) and internally at Hillingdon.

Attached to the report is the latest KPI Report from SCC.

RECOMMENDATIONS

It is recommended that Pensions Committee note this report

SUPPORTING INFORMATION

Surrey Administration Update

The fund continues to see a good uptake of members who have registered for the Member Self Service (MSS) module and the fund will continue to promote the advantages of registering for MSS.

Sign up to my-pension-online is currently 17% uptake

Membership Category	Total membership numbers	Registered for online self service
Active	8,322	2,874
Deferred	11,758	1,212
Pensioners	6,809	499
Total	**26,889**	**4,016**

All figures as at 24 September 2019

Resources

Surrey have appointed a new Engagement & Education Lead from July. Her main focus will be on communications with all of our stakeholders, whether that be Funds, Employers & Members. The aim is to improve the knowledge of all stakeholders and ensure any legislative or process changes are highlighted, with appropriate instructions/actions. SCC have continued to expand the team to better support the contract. The Lead Pensions Manager has now been in place for 9 months, making changes to the delivery of the service and ensuring sufficient resources in place.

Key Performance Indicators from February to May 2019

From July, KPI's have been calculated differently with legacy cases being separated from current work to show a truer reflection of SCC ability to carry out Hillingdon tasks and show current performance of cases arising. Legacy cases are monitored separately as part of the data improvement back log work and SCC will provide additional information to update performance.

The past quarter with separation of cases in existence before 01/07/2019 there has been a significant improvement in KPIs and improvement have also been made in clearing backlog cases and data issues.

In June 627 cases were completed, of which 373 (59%) were KPI cases. Of the KPI cases 20 (5%) were competed outside of target, all of which were started prior to June. SCC received one complaint during the month in relation to a delay transferring benefits to a new provider.

As a result of the separation of back log case work the KPI's have shown significant improvement. 1,177 cases were completed in July, or which 227 were KPI cases
There were only three cases completed outside of the KPI times, all of which have been completed within statutory timelines. SCC received three complaints in the month, one due to communication and two service delivery, of which one case information is outstanding from the employer.

In August 621 cases were completed, of which 268 were KPI cases. Of the KPI cases two were completed outside of the KPI target times, but both within statutory deadlines. There was one complaint received in the month relating to poor communication through transfer process.

Data Improvement Plan and Data Score

The Pensions Regulator requires schemes to monitor data quality at least annually and put in place a data improvement plan where necessary. Even schemes with good data can experience quick deterioration if controls are not in place.

Public sector schemes are required to submit annually their quality of data score distinguishing between

- common data – basic data items used to identify members, e.g. National Insurance number, address, name

- scheme-specific data – all the other data you need to run your scheme and calculate benefits, e.g. employment records

Data Score Results

The fund is in its second year of reporting on its data score and has seen a positive improvement in the score from 2018 to 2019 in particular on its Scheme Specific Data. This is the result of the effort and investment in data cleanse work over recent months, which has been a collaborative effort between administration, Fund and employers. Detailed breakdown of the score is still outstanding, to understand where the fund needs to make more

comprehensive improvements in its data quality. Once the detailed report has been received the fund will update the data improvement plan with appropriate actions.

	2018	2019	Movement
Common Data	79.0%	82.8%	+3.8%
Scheme Specific Data	79.9%	93.2%	+13.3%

The draft data improvement plan is attached for information and will be reviewed with input from SCC during the coming months to further document actions to improve the data quality gaps.

Annual Benefit Statements

The 2019 LGPS Annual Benefit Statements were uploaded to the members portal 'My Pension Online' by 31st August 2019 for active members to view.

The delivery of ABS this year for Active members has seen a success rate of 100% which is an excellent return, even more so when taking into consideration this has been achieved in parallel to the valuation work throughout the summer. There were 9 cases where the ABS was produced using 17/18 data due to outstanding queries with the relevant remployers, however the ABS's in these cases were clearly annotated they were using out of date information. A further run of statements covering these 9 cases has been scheduled once the information is received.

The deferred numbers are much lower at just under 57%. This is because many records had inconclusive confirmation of the members last known address and there were issues with regards to the data quality on the other records. Surrey plan to rectify this by doing address tracing work. In addition to the above all councillor statements were successfully sent by the end of June 2019.

FINANCIAL IMPLICATIONS

There are no financial implications in the report

LEGAL IMPLICATIONS

There are no legal implications arising from this report.