

Committee	Pensions Committee
Officer Reporting	Yvonne Thompson-Hoyte, Finance James Lake, Finance
Papers with this report	1. Surrey KPI Report 2. COVID-19 Critical Tasks Report

**HEADLINES**

The day-to-day administration of the Hillingdon Local Government Pension Fund (LGPS) is delegated to Surrey County Council (SCC) under a Section 101 agreement. This agreement runs from 1 November 2016 to 31 October 2021 and is currently being reviewed by Officers prior to the notification period of 12 months before the contact end date.

The Section 101 agreement includes Key Performance Indicators (KPIs) which are generally consistent with national standards. However over the last quarter the effects of the global COVID-19 pandemic has impacted the day-to-day operations of the workforce as staff were relocated to work from home as part of government measures to control the virus.

The Pensions Regulator (TPR) has issued new guidance to public service pension schemes outlining the critical tasks that schemes should focus on during this period. The KPI reporting will focus on the recommendations of TPR

**RECOMMENDATIONS**

1. That the Pensions Committee note this report.

**SURREY ADMINISTRATION UPDATE****Member Self Service Registration**

There are currently 7,006 members signed up to the Membership Self Service (MSS) portal. This is an increase of 1,271 on the period to May 2020. The largest percentage uptake is in the active member category where 42% of active members are signed up to MSS. The total registered represents 26% of the total membership which is up from 21% on the figures reported as at May 2020. There has been a steady increase in members signing up since the reduced operations of the pensions helpdesk due to COVID-19.

Membership Category	Total membership numbers	Registered for online self service	% uptake
Active	9,030	3,788	42%
Deferred	11,385	2,113	19%
Pensioners	6,995	1,105	16%
<b>Total</b>	<b>27,410</b>	<b>7,006</b>	<b>26%</b>

\*Figures are to the end of August 2020

Classification: Public

Pensions Committee 28 October 2020

## Summary of SLA monitoring

The table below provides a summary of the cases that were received along with the percentage of cases that were processed within the service level agreement targets.

Death grant payments (71%), notifications (47%) and lump sum payments (87%) continue to perform well below the targets. Performance in the remaining areas are varied in direction making it difficult to analyse the direction of travel. With the exception of death grant payments; the accumulation of missed cases are showing on the COVID-19 reports which show the opening and closing position. Officers will discuss this with Surrey at a planned meeting in October. The full report along with the COVID-19 report is attached

Activity	May-20			Jun-20			Jul-20			Aug-20		
	Volume	Score	Missed	Volume	Score	Missed	Volume	Score	Missed	Volume	Score	Missed
Death notification acknowledged, recorded and documentation sent	17	76%	4	9	100%	0	26	92%	2	15	47%	8
Payment of death grant made	13	77%	3	9	78%	2	29	66%	10	14	71%	4
Retirement notification acknowledged, recorded and documentation sent	42	76%	10	47	91%	4	53	83%	9	48	94%	3
Payment of lump sum made	30	80%	6	27	89%	3	36	89%	4	38	87%	5
Calculation of spouses benefits	2	50%	1	7	43%	4	12	75%	3	4	100%	0
Transfers In - Quotes	4	75%	1	21	67%	7	19	68%	6	7	100%	0
Transfers In - Payments	9	100%	0	7	100%	0	14	79%	3	39	92%	3
Transfers Out - Quote	12	67%	4	10	100%	0	36	97%	1	24	96%	1
Transfers Out - Payments	12	100%	0	9	89%	1	11	100%	0	19	100%	0
Employer estimates provided	2	100%	0	1	100%	0	8	63%	3	2	100%	0
Employee projections provided	2	100%	0	2	100%	0	4	100%	0	6	100%	0
Refunds	20	95%	1	20	100%	0	55	100%	0	34	97%	1
Deferred benefit notifications	17	41%	10	22	55%	10	11	100%	0	16	75%	4

## Annual Benefit Statements

All annual benefit statements were generated and distributed by the statutory deadline of 31 August 2020. Nine of the statements issued were calculated using the previous years figures as the associated employers did not provide the updated data to meet the deadline. Officers at Hillingdon have received details and are contacting employers for the updated information.

## Annual Allowance Notification Letters

Annual allowance notification letters were issued to scheme members whose pensions savings benefit was likely to exceed the standard allowance for the year. These were issued by the statutory deadline of 6 October 2021.

## **Staffing and Resources**

Staff at Surrey CC continue to work remotely with reduced and set hours to access the service desk. Hillingdon staff are working on a rota partly at home and partly in the office as the social distancing requirements allow.

## **FINANCIAL IMPLICATIONS**

Financial implications have been included in the body of the report

## **LEGAL IMPLICATIONS**

The legal implications are mentioned within the report.