

ADMINISTRATION REPORT**ITEM 6**

Committee	Pensions Committee
Officer Reporting	Yvonne Thompson-Hoyte, Finance
Papers with this report	1. Surrey KPI 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 ends in October 2021.

The Section 101 agreement includes Key Performance Indicators (KPIs) which are generally consistent with national standards. The effects of the global COVID-19 pandemic still impact the day-to-day operations of the workforce as staff remain working from home as part of government measures to control the virus.

From 27 September 2021 Hampshire County Council (HCC) will take over the provision of administration services for the pension fund under a new delegation agreement. This is therefore be the final administration report under SCC.

RECOMMENDATIONS

1. That the Pensions Committee note this report

SURREY ADMINISTRATION UPDATE**Member Self Service Registration**

The figures in this report are as at August 2021. Since the last report at April 2021, 1058 additional members have signed up for self-service bringing the total number to 8965 from 7907. The main contributor to the increase was the drive to get members signed up to receive their annual benefit statements.

Membership Category	Total membership numbers	Registered for online self service	% uptake
Active	9,758	4,489	46%
Deferred	10,664	2,776	26%
Pensioners	7,395	1,700	23%
Total	27,817	8,965	32%

The largest percentage uptake remains the active member category where 46% are signed up to MSS. The total registered represents 32% of the total membership.

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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. The general direction of travel for the KPI's has improved and is evident in the weighted average score and in the areas of death grant payments. There are however areas that Transfers in and out that remains well below the targets in all areas. This is the the final report under SCC.

Activity	Measure	Impact	Target	Apr-21			May-21			Jun-21			Jul-21		
				Volume	Score	Missed	Volume	Score	Missed	Volume	Score	Missed	Volume	Score	Missed
Death notification acknowledged, recorded and documentation sent	5 working days	M	100%	19	100%	0	12	100%	0	32	97%	1	38	95%	2
Payment of death grant made	10 working days	H	100%	5	20%	4	9	44%	5	3	100%	0	1	100%	0
Retirement notification acknowledged, recorded and documentation sent	10 working days	M	100%	42	60%	17	41	100%	0	59	90%	6	52	88%	6
Retirement - Payment of lump sum made & pension set up	10 working days	H	100%	56	91%	5	27	100%	0	37	84%	6	36	86%	5
Calculation of spouses benefits	10 working days	M	100%	9	0%	9	7	43%	4	12	58%	5	3	100%	0
Transfers In - Quotes	20 working days	L	100%	35	46%	19	28	46%	15	24	50%	12	33	61%	13
Transfers In - Payments	20 working days	L	100%	31	45%	17	40	40%	24	20	90%	2	37	59%	15
Transfers Out - Quote	20 working days	L	100%	25	92%	2	21	86%	3	18	67%	6	16	75%	4
Transfers Out - Payments	20 working days	L	100%	20	80%	4	11	91%	1	10	100%	0	9	78%	2
Employer estimates provided	10 working days	M	100%	10	80%	2	13	92%	1	10	70%	3	1	100%	0
Employee projections provided	10 working days	L	100%	6	100%	0	4	100%	0	9	89%	1	2	100%	0
Refunds	20 working days	L	100%	33	100%	0	39	100%	0	55	96%	2	69	96%	3
Deferred benefit notifications	20 working days	L	100%	29	31%	20	26	73%	7	28	46%	15	70	89%	8
Average SLA score	N/A			320	69%	99	278	78%	60	317	81%	59	367	84%	58
Complaints received- Admin				1	100%	0	0	N/A	0	0	N/A	0	1	0%	1
Complaints received- Regulatory															
Compliments received															
Queries Handled by Helpdesk				591 (FPF = 92%)			600 calls received (FPF = 92%)			484 calls received (FPF = 92%)			601 calls received (FPF = 92%)		

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ONGOING PROJECTS UPDATE

Annual Benefit Statements (ABS)

The preliminary report on the annual benefit statement exercise has been received from Surrey. The final full report is expected in October 2021. The ABSs for active members were produced and distributed in batches from 14 June 2021 up to 31 August. The deferred benefit statements were produced and distributed from the 11- 14 June 2021. The tables below provide a summary of the results.

LGPS HILLINDGON ACTIVE STATEMENTS 20.21				
No. of active statements run by 31 August 2021	EOY return	Missing 20/21 CARE Pay in EOY		Total no of records that are eligible to have a statement run
	Nos of records with no statement	No of records affected	Fund default option for missing pay	
8,066	0	375	Use 19/20 CARE pay	8,066

LGPS HILLINGDON DEFERRED STATEMENTS (20/21)						
Total No of Statements Produced	Total Nos errored	Nos errored breakdown				
		Gone away (supressed)	Error on record (calc not allowed)	Not eligible for statement	Other	Total Nos Errored
7806	245	224	21	0	0	245

Annual Allowance Letters

Notifications to inform those members that have exceeded their annual allowance were sent out by Surrey on 9 September 2021 with the exception of one employer, who had not responded to the request for data that is required for Surrey to perform the calculation. Officers are following up with the employer. The statutory deadline for affected members to be informed is 6 October. The date was brought forward to facilitate the pensions system being shut down for the final data transfer to Hampshire C.C.

McCloud Remedy

At the Committee in June 2021 it was reported that the timing of the transfer of administration services would not allow time for the McCloud remedy to be carried out by SCC and that tis would be undertaken by HCC after the transfer. It was further reported to the Committee that the HCC data colletion template would be issued to employers ahead of the transfer to get a

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head-start on the process. These were sent out at the end of July. After the transfer, Hampshire will take-over the follow-up communication and reminders to employers. The deadline for employers to return the forms to HCC is January 2022.

FINANCIAL IMPLICATIONS

Financial implications have been included in the body of the report

LEGAL IMPLICATIONS

The legal implications are in the body of the report.