



Report of: **Corporate Director of Finance and Resources**

Meeting of	Date	Agenda Item	Ward(s)
Pensions Sub Committee	16 September 2014	B1	

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SUBJECT: PENSION ADMINISTRATION PERFORMANCE

1. Synopsis

- 1.1 This report provides Members with information on the administration activities of the Pension administration section of the Finance Department. The information is in respect of the period from 1 June 2014 to 31 July 2014.
- 1.2 The report also provides information regarding the Internal Dispute Resolution Procedure, compliments and complaints.

2. Recommendations

- 2.1 To note the performance against key performance indicators for the relevant period.
- 2.2 To note the information in respect of the Internal Dispute Resolution Procedure, compliments and complaints.

3. Background – Statistics and key performance indicators

3.1 The membership profile at 31 May 2014 and 31 July 2014 is shown in the following table.

Category	May - 14	Jul - 14
Number of current active members	6,131	5,871
Number of preserved benefits	6,463	6,483
Number of Pensions in payment	5,020	5,054
Number of Spouses/dependants pensions in payment	935	932
Total	18,549	18,340

3.2. Key performance indicators from 1 June 2014 to 31 July 2014:

Process	Target days to complete	Volume	Target % Achievement	% Achieved within target days	Actual average days
Deaths	5	8	95%	100%	2.50
Retirement benefits	5	40	95%	90.00%	4.64
Pension estimates	10	85	95%	90.59%	7.61
Preserved benefit calculations	15	66	95%	83.33%	10.60
Transfer-in quotation	10	6	95%	66.67%	9.38
Transfer-in actual	10	6	95%	66.67%	8.83
Transfer out actual	12.5	5	95%	80.00%	10.20
Transfer out quotation	15	5	95%	100%	3.20
All processes	-	366	-	91.04%	-

3.3 The overall performance shows an improvement compared to the 89.61% for the previous period 1 February 2014 to 31 May 2014. There was an improved performance in respect of the higher priority cases, but a slightly lower achievement in respect of transfers from other pension scheme.

3.4 During the 2 year period to 31 July 2014, 109 communications have been received thanking Pension Administration for the service, including 6 since the previous meeting of the Sub Committee.

3.5. Two complaints have been received since the previous meeting of the Sub-Committee.

3.5.1 The first complaint was because a beneficiary had not received a letter setting out details of the pension entitlement. This was a one-off error, but procedures have been tightened to prevent any re-occurrence.

3.5.2 The second complaint was from a former employee of the Council who had a deferred pension entitlement with London Pension Fund Authority. The complaint arose because there had been no response to the beneficiary's enquiry regarding early release of the deferred pension. The Pension Administration team had requested relevant information from LPFA, but failed to notify the person. Procedures have been adjusted in the light of this case.

3.6 There were no new Internal Dispute Resolution Procedure (IDRP) cases.

4. Implications

4.1 Financial Implications

4.1.1 The cost of administering the Local Government Pension Scheme is chargeable to the Pension Fund.

4.2 Legal Implications

4.2.1 There are no specific legal implications in this report.

4.3 Equalities Impact Assessment

4.3.1 The council must, in the exercise of its functions, have due regard to the need to eliminate discrimination, harassment and victimisation, and to advance equality of opportunity, and foster good relations, between those who share a relevant protected characteristic and those who do not share it (section 149 Equality Act 2010). The council has a duty to have due regard to the need to remove or minimise disadvantages, take steps to meet needs, in particular steps to take account of disabled persons' disabilities, and encourage people to participate in public life. The council must have due regard to the need to tackle prejudice and promote understanding.

4.3.2 In respect of this report, an Equality Impact Assessment is not being made because the contents of the report relate to processes that are strictly in accordance with the statutory Local Government Pension Scheme Regulations. The LGPS Regulations are made under the Superannuation Act 1972, and the Council has a statutory duty to comply with the LGPS Regulations.

4.4 Environmental Implications

4.4.1 The environmental impacts have been considered and it was identified that the proposals in this report would have no adverse impacts

5 Conclusion and reasons for recommendations

5.1 The report is made to each meeting of the Committee and is provided in order to assess administration performance.

Background papers: None

Final Report Clearance

Signed by

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Corporate Director of Finance and Resources

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Date

Received by

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Head of Democratic Services

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Date

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