

<b>Date:</b>	<b>5<sup>th</sup> of September 2018</b>
<b>Classification:</b>	<b>General Release</b>
<b>Title:</b>	<b>Pension Administration Update</b>
<b>Report of:</b>	<b>Jo Meagher, Head of Operational People Services</b>
<b>Wards Involved:</b>	<b>All</b>
<b>Policy Context:</b>	<b>Service Delivery</b>
<b>Financial Summary:</b>	<b>Limited</b>

## **1. Executive Summary**

- 1.1.** This report provides a summary of the performance of the City Council, Surrey County Council and BT. The report gives an update on the Key Performance Indicator (KPI) performance of the pension administrators Surrey County Council (SCC) for the period April 2018 to July 2018. The detailed KPIs are shown in Appendix 1.

## **2. Surrey County Council (SCC) Performance**

- 2.1.** The scope of the KPIs in this report have been agreed between WCC and SCC based on the section 101 agreement, however they will continue to be reviewed on feedback from all parties, including committee members.
- 2.2.** This paper covers the period of April to July 2018 as it has been a few months since the Pension Board last met. August KPI figures would not be available at the time of writing this report.
- 2.3.** Since the last pension board meeting, Jason Bailey, the pension manager of Surrey CC has left his position. Surrey have appointed a new manager named Michael Mann and he is due to start employment on the 1<sup>st</sup> of October 2018. In the interim, People Services have been in regular contact with Clare Chambers who has been appointed as a service delivery manager for our contract. Overall contact with Surrey remains positive.
- 2.4.** Since the last pension board meeting Westminster has held its Pensions AGM on the 12<sup>th</sup> of April in the Strand offices. We have also run three individual

pension surgery sessions for staff. Feedback by staff has overall been positive. Staff wanted to talk about a number of issues but primarily, retirement options including flexible retirement, enhancing their pension benefits, transferring in additional service and understanding their annual benefit statement.

- 2.5. KPI performance in appendix 1 is summarised below:
- 2.6. The pension administration report would normally contain some detail on the trends relating to the Key Performance Indicators as outlined in Appendix 1. The KPI data is however showing little movement in trend to report to you. The figures show that everything is currently being completed within timescale. The main change within this period would be that notification to people with a deferred benefit due for payment is now going out to members within 2 months of the due date of the pension and this was not being met previously.
- 2.7. Annual Benefit Statements (ABS) for the year ending 31<sup>st</sup> of March 2018, have been published online by 31<sup>st</sup> of August 2018 as per regulatory requirements. WCC have promoted via the internal wire employees accessing their pension annual statement via the pension fund website. Other fund employers have also been asked to promote to their staff. Surrey have e-mailed fund members where they have e-mail addresses to ask them to register and internally Unison have been asked to promote with their members. In later pension board reports we hope to advise you of the number of members who have applied for self serve access and the approximate number of pension statements that have been viewed online.

### **3. BT Performance**

- 3.1 BT have been completing urgent pension leaver forms as requested by People Services. BT have sometimes been chased to complete forms in order that a members benefits can be released.
- 3.2 People Services had notified the pension committee that in the May payroll run BT had over deducted pension contributions for over 200 people. BT have admitted that they had not applied a previous solution to the payroll to account for April arrears being paid. The issue was corrected and pay issues impacting pensions are nominally low in the following months.
- 3.3 BT did provide end of year files to Surrey by the end of June 2018 following a checking process involving People Services staff. As above Surrey have produced ABS from the return on time which are available online for fund members. There are no known data issues to report in regards to the end of year file and the subsequent ABS.

### **4. Move to Hampshire City Council (HCC)**

- 4.1 The Pension Board should note that WCC are in the process of moving backline HR, payroll and finance services from BT to a shared service arrangement with

HCC. People Service has had to direct much of it's resource to the transfer of service and the transitional period is likely to be testing once the new service does go live. People Services are committed to working with HCC to make the new service successful.

## **5. Summary**

- 5.1** The Pension Administration service overall remains positive. Surrey KPI data is of an acceptable standard. The focus of People Services going forward into the autumn months will be on the new service provision with HCC.