



Pension Fund Committee

Date:	6th December 2022
Classification:	General Release
Title:	Pension Administration Update
Report of:	Sarah Hay, Pensions Officer People Services
Wards Involved:	All
Policy Context:	Service Delivery
Financial Summary:	£

1. Introduction

1.2 This report provides a summary of the performance of Hampshire Pension Services (HPS) with the Key Performance Indicators (KPIs) for the month of October 2022. In Section 3, I have updated the Pension Committee on the November 2022 data scores and given a brief update on our continuing data work. In section 4 I confirm that Harris have now signed the Compass admission agreement. This paper is for information only, there are no decisions required as a result of this paper.

2.1 KPI Performance

2.2 The scope of the KPIs in this report have been agreed between WCC and HPS in our agreement.

2.3 This paper covers the period of October 2022.

2.4 KPI performance for each month is within each partnership report. HPS report 100% compliance within the agreed KPI in each month. The majority of our KPIs require cases to be completed within 15 days. HPS do provide a breakdown for each category that shows the number of cases processed in each 5-day block.

2.5 Below I have summarised the cases completed in each category in the month.

KPI	Target Days	Oct-22
Active Retirement	15 days	8
Deferred Retirement	15 days	21
Estimates	15 days	46
Deferred Benefits	30 days	56
Transfers In & Out	15 days	1
Divorce	15 days	3
Refunds	15 days	17
Rejoiners	20 days	3
Interfunds	15 days	24
Death Benefits	15 days	13
Grand Total		192
		100%

2.6 There has only been one additional KPI reporting period available since the last Pension Committee meeting. The total case numbers processed in October increased back to 192 cases from 143 in September and reflect additional work coming in as employers responded to data requests from the fund as a result of the 2022 annual returns. There are currently 161 business as usual cases pending action which is a reduction on the prior month.

2.7 The fund strategy working with HPS is to increase the interaction the fund has with members via the member portal. In the last Committee report I updated that at the end of September we had 27.63% of members signed up to the member portal. This has now increased to 28.65% as at the end of October as broken down below. HPS are due to send out a letter to pensioners and deferred members who have not accessed the portal yet to encourage more to access their records.

Portal	Opted IN
Active	36.80%
Deferred	21.29%
Pensioner	29.15%
TOTAL	30.13%

2.8 In October there was one compliment received by HPS made by members and outlined below. There were also one compliant.

October Compliments was ", Prompt and reassuring reply."

2.9 Complaint raised was by a member who tried to access the portal whilst it was offline due to the cyber issue previously covered. The member then could not access the portal when it was brought back online, HPS reached out and helped the member to access his online records and the member was satisfied that his access issue was resolved.

3. Data Scores and Data Work

3.1 I am pleased to advise the Committee that that I have now received our November 2022 data scores and both common and scheme specific data have improved. The first data we measure is “common data” This will include standard information that all funds hold for members, including address details, date of birth, NI number. The second is “scheme specific” and will include items that only defined benefit schemes have including service lines, Career Revalued Earnings (CARE) pay, whole time pay etc. Our last data scores are set out below.

	Nov-21	Nov-22
Common Data	72%	82%
Scheme Specific	87%	89%

3.2 We will be delving into the issues with HPS that prevent our data being 100% in both categories in due course. In the next few months however, our focus will be on the data work already agreed i.e the backlog project the data work following the annual returns and the address tracing work. These projects should help clean our data and have the most imminent impact on our members.

3.3 The backlog project is well underway now with 536 cases in scope. Not all responses from employers have been received by HPS and so work is being done to chase employers to send in their missing data. The internal team is also going to have to guesstimate 10 leaver forms for people who had worked at Quintin Kynaston School who left before September 2017 when it became Harris Academy as no data is available to the employer to complete that work. College Park and Queen Elizabeth, the Second, have also asked if the fund can complete the leavers forms for them with their raw data as they lack the resources to do so themselves. We will review and see if we can complete the work but would need to charge the schools for this if we can resource.

3.4 I will be able to give a full update on the numbers at the next Pension Committee meeting but as an idea there were 68 records that had been deferred that were pending checking. There are also 15 refunds waiting to be approved for payment as of the 16th of November 2022, this is on top of the 94 cases that had already been completed. There is more work pending processing and queries going back and forth with employers thus clearer picture on the numbers will be available in January 2023.

- 3.6 In the last report I confirmed that we had 78 outstanding queries following the 2022 annual returns reduced from an original 775. We have now managed to reduce the outstanding queries to 63, the remaining queries are primarily with a few employers, St Marylebone School has the largest number of queries outstanding. The fund has raised a PAS charge of £100 of St Marylebone and contact has been made with the Head asking that the remaining data is cleared. More PAS charges will follow where engagement is not happening. We also have concerns about St Marylebone Bridge School and St Augustine's but most employers and payroll providers are engaging with the fund trying to resolve outstanding cases.

Outstanding Queries at 14/10/2022						
Starters	Leavers	Missing Data	Add Conts	Pay *	Other	Total *
34	5	33	0	6	0	78

Employer Name	Starters	Leavers	Missing Data	Pay	Other	Total
WCC Maintained Schools (Strictly Edu)		1	6		4	11
St Marylebone School (Academy)	18		5	1		22
College Park and Queen Elizabeth II (WCC)		1				1
St Augustine's Primary and High School (WCC)			13			13
St Marylebone C E Bridge Schl	6		1			7
Future Acad - Pimlico Primary Academy	1	1	3		1	6
Future Acad - Churchill Gardens Academy		1	1			2
Harris St Johns Wood Academy **			1			1

Total 63

- 3.7 Address tracing has recommenced as per the last Pension Committee report but there is no further update on responses at this time.

4 Employer Updates / Other Admin Issues

- 4.1 An update on the Compass Admission Agreement for the ten staff that were tupe transferred to them in 2018 from Harris Academy. Harris have now signed the admission agreement we are expecting the document to be signed by Compass then we will arrange sealing in WCC. This should be resolved shortly and the members records resolved. I have advised Harris that they must engage the fund before reletting this contract which I understand is due to end in August 2023.

5. Summary

- 5.1 In Section 2, I covered the KPI data for the period October 2022 is 100% within the agreed target.
- 5.2 In section 3, I update the Pension Committee on our improved 2022 data scores. In addition, I give a brief outline of the progress on the backlog project and the annual return queries since the last report.
- 5.3 Finally in section 4, I updated the Committee that we are now close to finalising the Admission Agreement for the ten staff that were transferred to Harris after Harris finally agreed to sign the Admission Agreement.
- 5.4 There are no decisions required from the Pension Committee in relation to this paper.