

Date:	21st September 2023
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 June 2023 through to August 2023. In section 3 I give an update on the ongoing data projects and a small update on member engagement in section 4.

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 June 2023 to August 2023.

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	Jun-23	Jul-23	Aug-23
	Days			
Active Retirement	15 days	5	9	6
Deferred Retirement	15 days	19	18	31
Estimates	15 days	27	74	24
Deferred Benefits	30 days	44	26	29
Transfers In & Out	15 days	1	1	16
Divorce	15 days	5	1	2
Refunds	15 days	10	14	13
Rejoiners	20 days	4	0	3
Interfunds	15 days	22	24	0
Death Benefits	15 days	9	12	15
Grand Total		146	179	139
		100%	100%	100%

2.6 I am pleased to say that BAU work progresses well, and I have no general concerns. There are currently 200 business as usual cases pending action at the end of August.

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 Board report I updated that at the end of May 2023 we had 35.50% of members signed up to the member portal. This has now increased to 38.82% as at the end of August 2023 as broken down below. I am very pleased that we continue to see increased portal membership take up across all areas of the membership.

Portal	Opted IN
Active	46.00%
Deferred	30.00%
Pensioner	43.09%
TOTAL	38.82%

2.8 HPS received two compliments in June, one in July and two in August from our members as below.

“Everything was perfect, and Carla was very friendly and professional and very good at explaining all.”

"Thank you so much for your email and the news that Utmost has now released my AVC fund. As I've said to a few of your colleagues over the past few months, if I had my time again, I'd remember to transfer my AVC when I transferred my main pension! Thanks also for your apology. However, I do realise that an awful lot of the delay has been down to Utmost and please accept my thanks to whoever kept chipping away at them! Could you please also pass on my thanks to everyone in the Hampshire team who has helped me - along with my apologies for having mithered them so much over the past few months. Everyone I've dealt with has been extremely polite and prompt in dealing with all my phone calls and emails."

"Answered questions clearly".

"Prompt Response"

"It was explained to me that the login system changed in June."

2.9 There were no complaints received within the period.

3. Data Work

3.1 Progress on the backlog project continues but more slowly now as many of the remaining cases employers are struggling to provide information. Of the 611 cases in scope, HPS have completed 577 with 34 remaining as of the 6th of September 2023. Of the 34 cases remaining 8 are currently subject to action by HPS and I would hope can be completed quickly. Of the remaining cases officers will have to work with employers on an individual case by case basis to determine action best in each case.

3.2 The 2022/2023 Annual returns generated a total of 469 member queries., we are left now with a total of 29 queries. I am very pleased that our employers have engaged with the fund to reduce their queries and much quicker than we had last year. The good response has resulted in the high number of annual statements we managed to send out in time this year as detailed below. We still need to make sure that the number of queries we have in the future reduces further in particular in relation to missing new starters and leavers.

3.3 Hampshire Pension Services (HPS) employers' team are going to shortly provide us with the first Employer Performance Scores. Those scores will effectively measure each employer in three key areas following the annual returns for 22/23. The three areas are timeliness, financial control and data quality, each area will be graded into a traffic light colour in line with the score so green will represent pass, amber warning to improve and red will be a fail in that area with a warning to improve.

3.4 Timeliness will be reviewing if the employers sent in their annual return by the 30th April 2023 deadline and the time it takes them to reply to queries. If

employers send their returns in on time and reply to queries without the need to chase, they will pass in this area. Financial Control will be measuring that the correct contributions are being deducted and paid to the fund and that the annual return matches the payments made to the fund by the employer. Data quality will be measuring the number of queries that an employer has in relation to their membership. Once the scores are discussed we will be writing to all the fund employers with their scores and outlining steps that employers with failures and warnings in any of the categories need to take next year to ensure that they improve. Longer term we will look to add the requirement to meet a certain level of employer performance scores into our Pension Administration Strategy (PAS).

- 3.5 The production of Annual Benefit Statements (ABS) has continued with 99.38% Active member benefit statements produced by the 31st of August deadline. There are 30 active statements outstanding that relate to queries with the members employer. Of the 44 preserved benefit statements that had previously not been provided to members only 5 remain outstanding with 99.93% of statements sent by the 31st of August 2023. This is excellent production rates and does indicate the overall quality of our member data.
- 3.6 Pension Saving Statements (PSS) for those who have exceeded the annual allowance in 22/23 are on track to be published by the 5th of October 2023.

4 Member Engagement

- 4.1 The Internal team have attended a couple of events in 2023, organised by the Westminster Women's network to support members to understand their pension. The first was on the 18th of May 2023 on the Pensions Journey. The second was a follow up event on the 5th of September 2023 to help members understand their annual benefit statements and to answer questions members had in relation to a range of issues in relation to the Local Government Pension Scheme. I would hope that with the delivery of key projects in the coming months we will be able to provide more individual support to members of the fund across all employers.

5. Summary

- 5.1 In Section 2, I covered the KPI data for the period June 2023 through to August 2023 is 100% within the agreed target.
- 5.2 In section 3, I update the Pension Board on the continuing data work projects.
- 5.3 I also update the Board on the high percentage member statements produced for 22/23.
- 5.4 I update the Pension Board on member engagement the internal team are supporting.