



Committee and date  
Pensions Committee  
29 November 2012  
10.00am

Item  
**8**  
Public

## PENSIONS ADMINISTRATION MONITORING REPORT

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### 1. Summary

- 1.1 The report provides Members with monitoring information on the performance of and issues affecting the Pensions Administration Team.

### 2. Recommendations

- 2.1 Members are asked to accept the position as set out in the report.

## REPORT

### 3. Risk Assessment and Opportunities Appraisal

- 3.1 **Risk Management**  
Performance is considered and monitored to ensure regulatory timescales and key performance indicators are adhered to.
- 3.2 **Human Rights Act Appraisal**  
The recommendations contained in this report are compatible with the Human Rights Act 1998.
- 3.3 **Environmental Appraisal**  
There is no direct environmental, equalities or climate change consequence of this report.
- 3.4 **Financial Implications**  
There are no direct financial implications arising from this report.

### 4. Performance

- 4.1 It was reported at the last meeting that a Shared Services operating group had been established which is made up of client side lead officers and Shared Services Management. The first meeting of this group was held in the Summer.

- 4.2 The November Operating Group meeting was cancelled but the performance was shared.
- 4.3 The team's output and performance levels to the end of October 2012 are attached at Appendix A. This shows a gradual reduction in the number of procedures outstanding to 1444 in October. This number had spiked back in January 2012 to 1736 which was mainly due to staff leaving resulting in a backlog of leavers requiring their deferred benefits to be calculated.
- 4.4 Historically the level of outstanding tasks has been between 1000-1200 and this is where it has to be reduced to. The team report that processes are in place to clear the backlog prior to the Valuation next year.
- 4.5 The chart shows that in October 2012 68% of tasks were processed on time.
- 4.6 The team also deal with unscheduled requests for large numbers of redundancy quotes for Shropshire Council. The following table shows redundancy calculations undertaken during the last 6 months:

Month	Under age 55 quotes	Over age 55 quotes	Total
April	10	18	28
May	29	30	59
June	6	15	21
July	147	65	212
August	66	31	97
September	24	26	50
October	136	79	215

In July, August and October there was a particularly large number of redundancy calculations in comparison to other months. It is also worth noting that these figures are only representative of employees who are members of the pension scheme. Redundancy calculations are also made by the team for Shropshire Council employees who are not in the pension scheme. These calculations are usually requested by the employer for costing purposes where a restructure is taking place.

## 5. Annual Meeting 2012

- 5.1 This years Annual Meeting took take place on 6 November 2012. There were 3 meetings; one at the Civic Offices in Telford and 2pm and 5pm meetings at the Walker Theatre, Theatre Severn in Shrewsbury.
- 5.2 Presentations were given by Rachel Musson on an Overview of the Year, Justin Bridges on Investment Performance, Pimco on Global Aggregate Bonds and Debbie Sharp on Pensions Scheme Review.

- 5.3 Attendance was good, but down on previous years, with approximately 200 people over the 3 meetings. An electronic survey has been sent to all attendees, with email addresses, to gain feedback on how we can develop the meeting next year. The meeting was filmed and will be made available on the funds website [www.shropshirecountypensionfund.co.uk](http://www.shropshirecountypensionfund.co.uk) shortly.

## 6. Communications

- 6.1 A meeting was held for the funds employers on 23 October 2012. Attendance was good and over 30 employers were represented. The Funds actuary John Livesey and Jeff Houston, from Local Government Employers organisation, gave presentations on the 2013 valuation and the New Scheme for 2014.
- 6.2 "INTOUCH" the bi-annual newsletter for retired scheme members was issued with payslips in September 2012. A copy of this is attached at Appendix B.
- 6.3 The team is looking to increase electronic methods of communications with members where they can by using email and more self-service from the web site. This reduces costs on postage and provides a better value for money for the members.
- 6.4 The Miscellaneous Regulations were introduced from 1 October 2012, as reported to the committee in September. A newsletter has been put together for employees and employers detailing these changes together with an overview at the annual meeting.
- 6.5 Work is also being carried out on the Funds literature to ensure statutory compliance with the Auto Enrolment regulations. The Funds' largest employer Shropshire Council's staging date is February 2013. The Borough of Telford and Wrekin's staging date is March 2013.

## 7. Contact Team Statistics

- 7.1 The 3 employees who cover the Pensions Helpdesk became part of the Contact team when the team was moved into Shared Services, although they are still located with the Pensions Administration team. Co-location has ensured that the Pensions Transaction team are able to cover the phones where necessary and ensured the whole teams specialist knowledge is kept up to date.
- 7.2 All calls coming through the helpline are now monitored using "i support" and "Pro-centre", the telephony software currently being used by Shared Services. This gives a clear picture of the number of calls the Pensions Contact team are dealing with, together with the number dealt with at first point of contact. Statistics on the number of calls, emails and hits to the website over the last quarter are:

	<b>August 2012</b>	<b>September 2012</b>	<b>October 2012</b>
<b>Telephone calls answered</b>	789	623	733
<b>Queries dealt with by helpdesk at first point of contact %</b>	99%	98.86%	98.8%
<b>Emails received and responded by the helpdesk</b>	194	375	322
<b>Hits to the Pension Fund website</b>	3,680	3,900	3,985

**List of Background Papers (This MUST be completed for all reports, but does not include items containing exempt or confidential information)**

Pensions Committee Meeting 13 September 2012, Item 12, Pensions Administration Report

**Cabinet Member (Portfolio Holder)**

NA

**Local Member**

NA

**Appendices**

Appendix A – Performance Monitoring

Appendix B - intouch