



Committee and date
Pensions Committee
19 September 2014
10.30am

Item
12
Public

PENSIONS ADMINISTRATION MONITORING REPORT

Responsible Officer Debbie Sharp

Email: Debbie.sharp@shropshire.gov.uk

Tel: 01743 252192

Fax: 01743 255901

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 and;

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. Managing team performance and working with other Administering Authorities ensures costs to scheme employers for Scheme Administration are reduced. However, it must be noted that the introduction of the 2014 LGPS and the increased governance being introduced by the Public Services Pension Act 2013 will increase the resources required by the administration team.

4. Performance and Team Update

- 4.1 The team's output and performance levels to the end of August 2014 are attached at **Appendix A**.
- 4.2 The team have been working on ensuring that accurate pay figures are held on individual records as at 31 March 2014. This has been calculated from the data supplied on year end returns by all scheme employers. The data is then used to calculate benefits/information supplied on Annual Benefit Statements which will be sent to all active employees of the Scheme at the end of September.
- 4.3 This additional work, together with staff holidays is reflected in the increase in procedures outstanding and procedures completed on the chart. Backlogs that have been created over this period are being tackled with a plan in place to clear them by the end of this financial year.
- 4.4 The team is now fully staffed and training is underway for the newest staff members.
- 4.5 The External Audit was not undertaken in the agreed time slot. This meant that when it was undertaken team members were on holiday and this resulted in added pressure to the team over the summer period.

5. Help Desk Statistics

- 5.1 The following chart shows the number of queries received through the helpline number and the number of emails received to the generic Pensions email inbox.

	June 2014	July 2014	August 2014
Telephone calls answered	823	876	763
Queries dealt with by helpdesk at first point of contact %*	80%	99.65%	99.08%
E-mails Received and responded by the helpdesk	281	307	256

* Where queries have not been dealt with by helpdesk, this will usually mean that the calls have been picked up by the rest of the team outside of the helpdesk.

6. Communications

- 6.1 The launch of the new website from 1 April 2014 was reported earlier in the year. Interestingly the following visitor numbers have since been logged:

Month	Website Views	Users	Page Views
July 14	1411	994	4342
Aug 14	1196	861	4092

- 6.2 There is now a secure area on the website for employer's information which includes the latest guidance and forms.
- 6.2 Annual Benefit Statements for Active employees are to be issued at the end of September to member's home addresses. ADARE have been contracted for the printing and dispatch. A newsletter will be included as an insert and is attached at **Appendix B**.

7. Local Government Pension Scheme 2014

- 7.1 A detailed review of team processes and the effects of the recently issued GAD guidance is being undertaken. This will include reviewing letters and work flow procedures.
- 7.2 The Pensions Communication Officer attended another meeting of the Communications Working Group set up by the LGA with representatives from Funds nationally. They are able to share ideas on communications to scheme employees and employers regarding the key changes under the new scheme. The ideas and information shared will help the team in their review of processes.
- 7.3 Work is underway to enable Fund employers to send the new CARE data, to record to individual records, monthly. Several employers are already sending a monthly return. Work will be starting on ensuring this information is uploaded electronically to the Pensions administration system.

8. Annual Meeting

- 8.1 This year's annual meeting will be held at the Walker Theatre, Theatre Severn, Shrewsbury on 21 November 2014 at 10.00am.
- 8.2 If you are able to attend, please let a member of the Pensions Team know by calling 01743 252130 or emailing: pensions@shropshire.gov.uk.

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

Pensions Committee Meeting 20 June 2014 Pensions Administration Report

Cabinet Member (Portfolio Holder)

NA

Local Member

NA

Appendices

Appendix A – Performance Monitoring

Appendix B – Newsletter for Active scheme employees