






## PENSION ADMINISTRATION PERFORMANCE 2021

## 1. Summary of key cases recorded on Altair Workflow between 1 July 2020 to 31 March 2021

Case type	Total cases completed	Target days to complete	Percentage completed within target Jul to Sep 2020	Percentage completed within target Oct to Dec 2020	Percentage completed within target Jan to Mar 2021	Rating >= 95% Green >= 90% Amber < 90% Red	Comments
Deferred benefit estimates & actuals	60	10	74%	88%	85%		There was a slight dip this quarter possibly due to staff taking leave and end of year process commencing. There is an ongoing exercise to identify if all Workflow tasks are closed off in a timely manner which has an impact on the performance statistics.
Deaths	58	10	80%	97%	90%		The dip again in this quarter could be related to the above reasons. This will be closely monitored over the coming weeks.
Retirement estimates & actuals	165	8	83%	91%	90%		The dip again in this quarter could be related to the above reasons and also the higher than average number of retirements processed. This will be closely monitored over the coming weeks.
Transfers in / out estimates & actuals	84	25	74%	98%	85%		The dip again in this quarter could be related to the above reasons. This will be closely monitored over the coming weeks.
Refunds	37	10	98%	96%	100%		

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## 2. Member Self Service Statistics

[Member Self-Service](#) (MSS) is an on-line platform to enable pension scheme members to access details about their LGPS pension rights.

Type of member	Number of MSS users at 30.09.19	Number of MSS users at 31.12.19	Number of MSS users at 30.06.20	Number of MSS users at 30.09.20	Number of MSS users at 31.12.20	Number of MSS users at 31.03.21	Increase since 31.12.20	*Percentage of users by membership type at 31.03.21
Active	739	781	924	1,164	1,216	1,222	6	24.36%
Deferred	473	504	602	676	676	668	-8	7.90%
Pensioners	689	728	735	772	875	937	62	14.87%
Widow/ dependant	31	32	38	42	42	41	-1	3.58%
Totals	1,932	2,045	2,299	2,654	2,809	2,868	59	13.71%

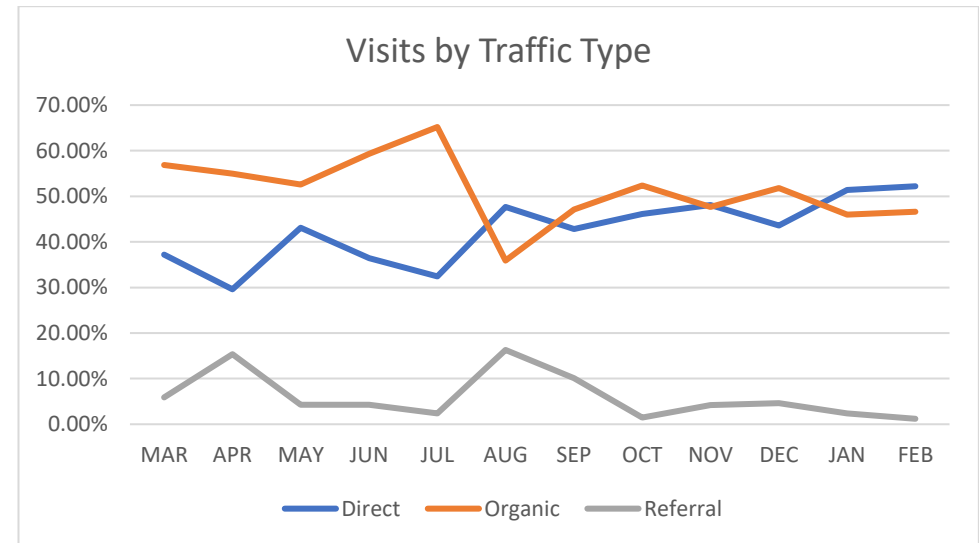
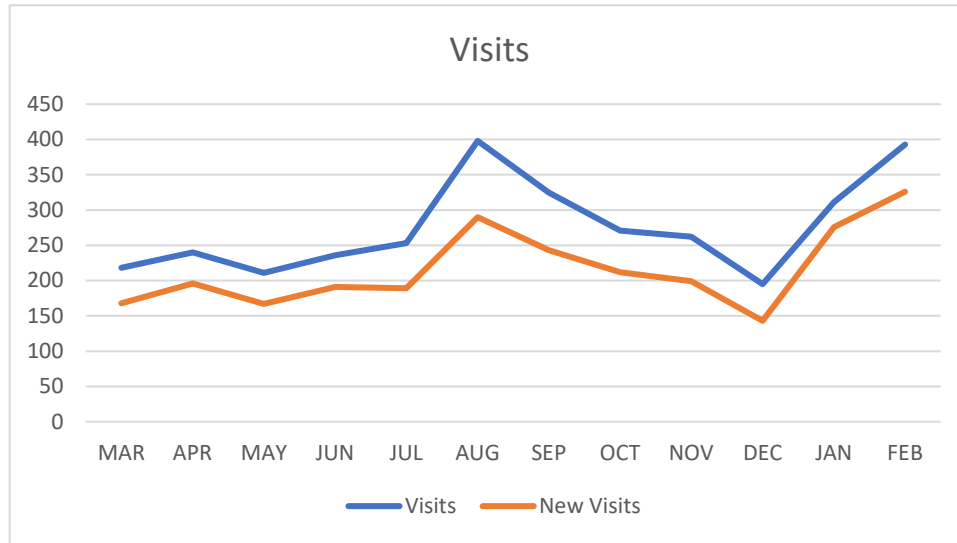
\*Membership: 5,016 actives; 8,456 Deferred Pensioners; 6,300 Pensioners; 1,146 Widow/dependants.

A summary of activity that compares the periods during 2019 to 2021 is given in the table below.

Activities	Jan 2019 to Jun 2019	Jul 2019 to Sep 2019	Oct 2019 to Dec 2019	Jan 2020 to Jul 2020	Jul 2020 to Sep 2020	Oct 2020 to Dec 2020	Jan 2021 to Mar 2021
Number of log ins	1,979	1,740	905	2,053	1,619	1,124	1,089
First Time Logins	-	277	131	-	403	163	126
Incorrect passwords	441	626	248	525	366	281	286
Usernames not recognised	944	1,038	434	879	976	452	431
Disabled accounts	133	207	60	103	94	67	65
People viewing documents	438	103	241	430	102	495	277

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3. Lambeth Pension Fund [website](#) statistics during 2021



Month	MAR 20	APR 20	MAY 20	JUN 20	JUL 20	AUG 20	SEP 20	OCT 20	NOV 20	DEC 20	JAN 20	FEB 20
<b>Visits</b>	218	240	211	236	253	398	325	271	262	195	311	393
<b>New Visits</b>	168	196	167	191	189	290	243	212	199	143	276	326
<b>Page Views</b>	277	313	269	299	328	549	428	342	325	257	422	512
<b>Visits by traffic type</b>												
<b>Direct</b>	37.20%	29.60%	43.10%	36.40%	32.40%	47.70%	42.80%	46.10%	48.10%	43.60%	51.40%	52.20%
<b>Organic</b>	56.90%	55%	52.60%	59.30%	65.20%	35.90%	47.10%	52.40%	47.70%	51.80%	46.00%	46.60%
<b>Referral</b>	5.90%	15.40%	4.30%	4.30%	2.40%	16.30%	10.10%	1.50%	4.20%	4.60%	2.40%	1.20%

**\*Visits by traffic – see below definitions:**

**Direct** – Users who come to the website directly by typing in the web address (or using a favourite).

**Organic Traffic** – Users who come to the website from natural search engine results.

**Referral** - Visitors that landed on the website through a link on another website, such as Facebook or a site that references a blog article.

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## 4. Complaints

Complaint	Response	Open/Closed
Deferred member claimed that there was an incorrect period of service shown on their deferred statement.	Explained to the member that the deferred pension statement was interpreted incorrectly and provided further clarification.	Closed
Deferred member unsatisfied with the delayed response from Occupational Health in relation to the member's request to receive early payment of pension benefits due to ill health.	Active communication with Occupational Health to expedite an appointment in order to reach a resolution.	Closed
Active member complaint regarding the period of service showing on their pension statement.	Explained that this period of service was provided by the employer and therefore needed to be clarified with the employer. The employer was also contacted.	Closed
Complaint raised regarding the delay in receiving a transfer value quotation.	The individual had two periods of service and a quotation was provided for only one. The oversight was immediately corrected.	Closed

## 5. Breaches – Pensions Administration 2021

The table below is an extract of the Breaches Log for 2021 inclusive of all breaches from previous periods that remain open.

Date Identified	Description & cause of breach	Reported Yes/No (with justification if N and dates)	Actions to be taken / Outcome	Date actions taken	RAG	Possible effect of breach and wider implications	Open / Closed with date	Reported to Regulator N/Y with date
20.05.19	Non-payment of employer secondary contributions	Yes	Historic issue with employer in terms of paying over the secondary contributions. Various discussions to resolve the situation have taken place including legal proceedings.	Ongoing	Red	The funding position of the employer worsens over time.	Open	No
27.03.20	Non-payment of employer contributions	No	Employer reminded of their statutory obligations. Continued discussions ongoing and finalising resolution. A cessation valuation has been undertaken and discussions on payment are ongoing.	Mar-20 onwards	Amber	The funding position of the employer worsens over time.	Open	No

For the LGPS a breach occurs if there is a failure to do anything required under the Regulations, Framework or overriding legislation. This includes providing incorrect information. Action is being taken to identify any other breaches and if applicable these will be added to the Breaches Log. Single, low impact breaches are usually considered to be immaterial. A series of breaches can amount to a material breach and then a decision would be needed about whether to report to The Pensions Regulator. Currently the breaches listed above are not being reported.