

## PENSION ADMINISTRATION PERFORMANCE JUNE 2021

## 1. Summary of key cases recorded on Altair Workflow between 1 October 2020 to 30 June 2021

Case type	Total cases completed	Target days to complete	Percentage completed within target Oct to Dec 2020	Percentage completed within target Jan to Mar 2021	Percentage completed within target Apr to Jun 2021	Rating >= 95% Green >= 90% Amber < 90% Red	Comments
Deferred benefit estimates & actuals	66	10	88%	85%	92%	↑	Improvement from previous quarter. Due to staff shortages in this quarter (one leaver as at 31 March 2021 and one long term absence) the focus was on completing the processes generating payments to members (i.e. refunds, deaths, retirements and pension payroll). This meant that there was a slight delay in processing deferred statements and transfers.
Deaths	53	10	97%	90%	93%	↑	Improvement from previous quarter.
Retirement estimates & actuals	204	8	91%	90%	95%	↑	There was a higher than average number of retirements processed in this quarter.
Transfers in / out estimates & actuals	162	25	98%	85%	60%	↓	Due to staff shortages in this quarter (one leaver as at 31 March 2021 and one long term absence) the focus was on completing the processes generating payments to members (i.e. refunds, deaths, retirements and pension payroll). This meant that there was a slight delay in processing deferred statements and transfers. There was also a high volume of transfer requests in this quarter and additional scrutiny being undertaken in light of the increased potential for transfer scams during this time.
Refunds	20	10	96%	100%	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 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	Number of MSS users at 30.06.21	Increase since 31.03.21	*Percentage of users by membership type at 30.06.21
Active	781	924	1,164	1,216	1,222	1,253	31	25.05%
Deferred	504	602	672	676	668	713	45	8.43%
Pensioners	728	735	772	875	937	994	57	15.70%
Widow/ dependant	32	38	42	42	41	41	0	3.57%
Totals	2,045	2,299	2,654	2,809	2,868	3,001	133	14.33%

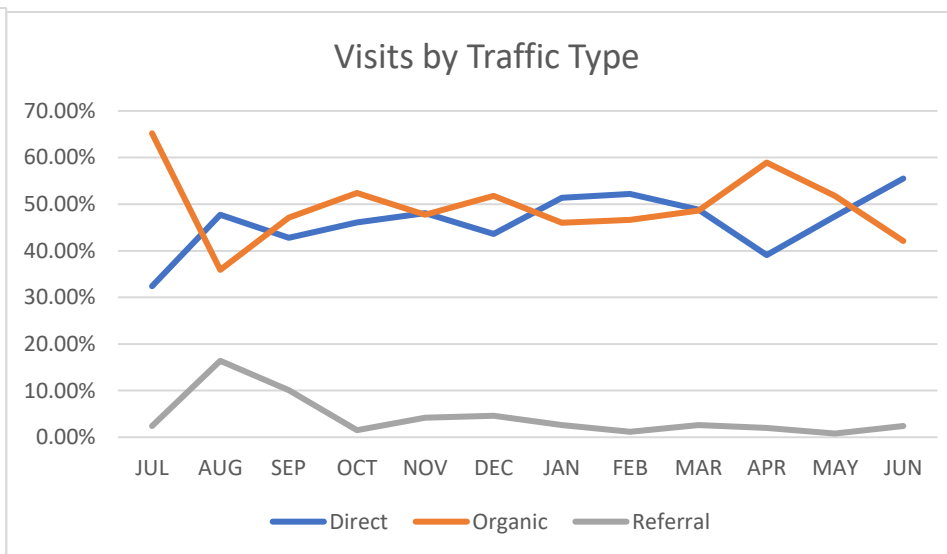
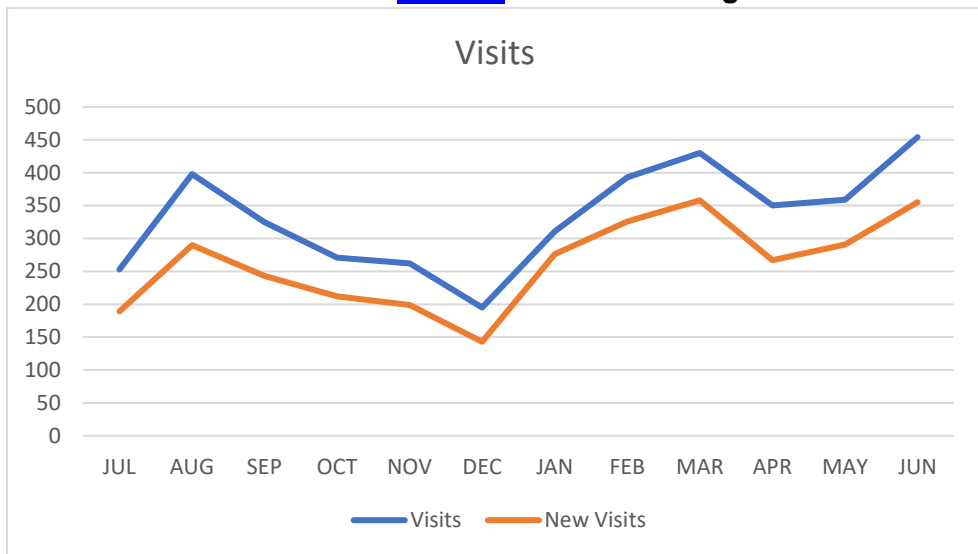
\*Membership: 5,002 actives; 8,463 Deferred Pensioners; 6,332 Pensioners; 1,150 Widow/dependants.

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	Apr 2021 to Jun 2021
Number of log ins	1,979	1,740	905	2,053	1,619	1,124	1,089	1,668
First Time Logins	-	277	131	-	403	163	126	127
Incorrect passwords	441	626	248	525	366	281	286	311
Usernames not recognised	944	1,038	434	879	976	452	431	573
Disabled accounts	133	207	60	103	94	67	65	65
People viewing documents	438	103	241	430	102	495	277	583

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



Month	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
<b>Visits</b>	253	398	325	271	262	195	311	393	430	350	359	454
<b>New Visits</b>	189	290	243	212	199	143	276	326	358	267	291	355
<b>Page Views</b>	328	549	428	342	325	257	422	512	538	442	454	571
<b>Visits by traffic type</b>												
<b>Direct</b>	32.40%	47.70%	42.80%	46.10%	48.10%	43.60%	51.40%	52.20%	48.80%	39.10%	47.40%	55.50%
<b>Organic</b>	65.20%	35.90%	47.10%	52.40%	47.70%	51.80%	46.00%	46.60%	48.60%	58.90%	51.80%	42.10%
<b>Referral</b>	2.40%	16.40%	10.10%	1.50%	4.20%	4.60%	2.60%	1.20%	2.60%	2%	0.80%	2.40%

**\*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
Pensioner member's pension was abated due to re-employment and objected to the period for recovery of arrears.	Advised the member of the abatement policy and agreed a more suitable period to recover arrears.	Closed
Deferred member unsatisfied with the delayed response from Lambeth Pensions in payment of benefits due to ill health.	Advised the member of the reason for the delay and made appropriate payment..	Closed

## 5. Breaches – Pensions Administration 2021

The table below is an extract of the Breaches Log for 2021 in relation to this quarter 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 payment of the full deficit has been made to the Fund.	Mar-20 onwards	Green	The funding position of the employer worsens over time.	Closed May 2021	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.