

## PENSION ADMINISTRATION PERFORMANCE SEPTEMBER 2021

## 1. Summary of key cases recorded on Altair Workflow between 1 January 2021 to 30 September 2021

Case type	Total cases completed	Target days to complete	Percentage completed within target Jan to Mar 2021	Percentage completed within target Apr to Jun 2021	Percentage completed within target Jul to Sep 2021	Rating >= 95% Green >= 90% Amber < 90% Red	Comments
Deferred benefit estimates & actuals	66	10	85%	92%	95%	↑	Improvement from previous quarter although there were staff shortages in this quarter (one leaver as at 30 September 2021).
Deaths	56	10	90%	93%	90%	↓	Staff shortage in this quarter. There was also a focus on completing the benefit statement and annual allowance exercises which are subject to statutory deadlines. This meant that there was a slight delay in processing other work.
Retirement estimates & actuals	173	8	90%	95%	90%	↓	Staff shortage in this quarter. There was also a focus on completing the benefit statement and annual allowance exercises which are subject to statutory deadlines. This meant that there was a slight delay in processing other work.
Transfers in / out estimates & actuals	162	25	85%	60%	75%	↑	Staff shortages this quarter. Additional scrutiny continues to be undertaken in light of the increased potential for transfer scams during this time.
Refunds	56	10	100%	100%	95%	↓	Staff shortage in this quarter. There was also a focus on completing the benefit statement and annual allowance exercises which are subject to statutory deadlines. This meant that there was a slight delay in processing other work.

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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	Number of MSS users at 30.09.21	Increase since 30.06.21	*Percentage of users by membership type at 30.09.21
Active	781	924	1,164	1,216	1,222	1,253	1,274	21	25.96%
Deferred	504	602	672	676	668	713	798	85	9.39%
Pensioners	728	735	772	875	937	994	1,031	37	16.29%
Widow/ dependant	32	38	42	42	41	41	40	-1	3.45%
Totals	2,045	2,299	2,654	2,809	2,868	3,001	3,143	142	15.07%

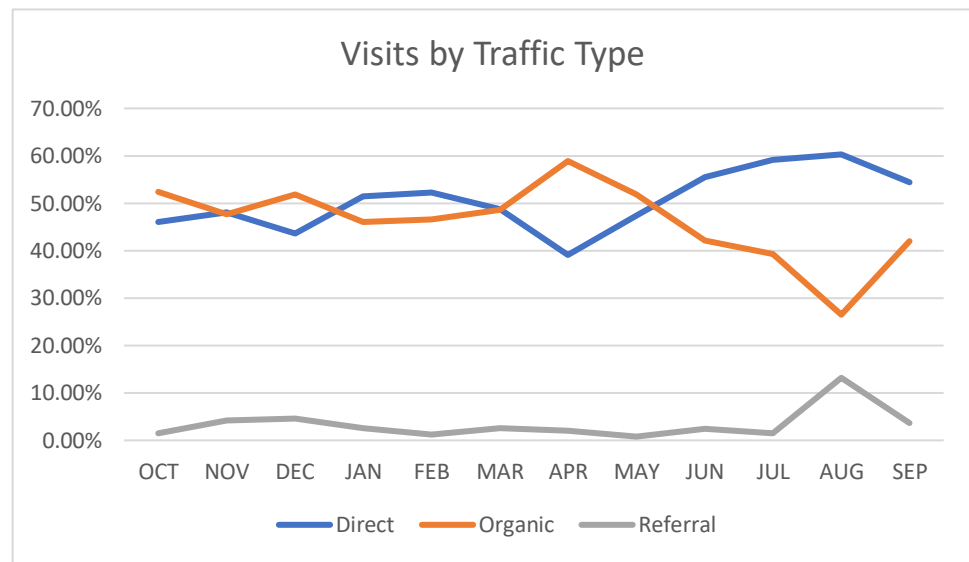
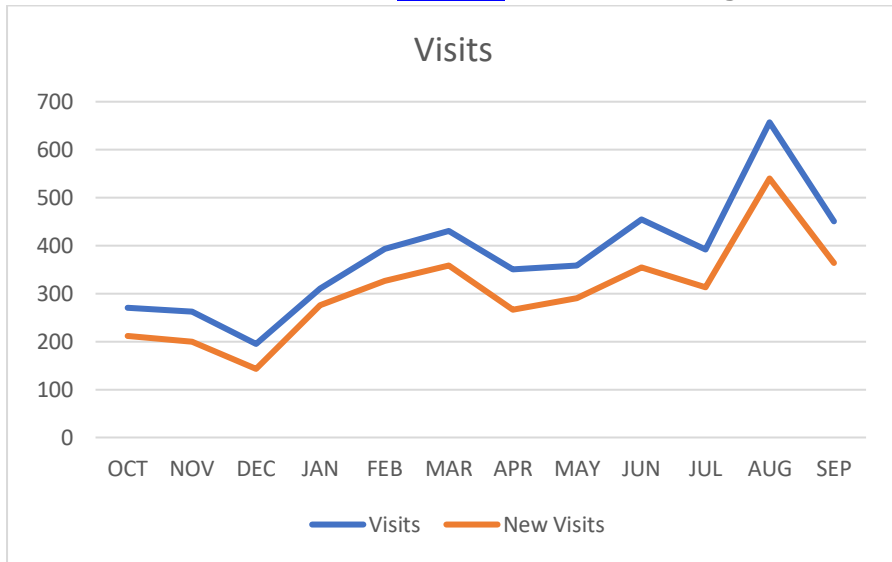
\*Membership: 4,907 actives; 8,498 Deferred Pensioners; 6,327 Pensioners; 1,160 Widow/dependants.

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	Jul 2021 to Sep 2021
Number of log ins	1,979	1,740	905	2,053	1,619	1,124	1,089	1,668	1,832
First Time Logins	-	277	131	-	403	163	126	127	248
Incorrect passwords	441	626	248	525	366	281	286	311	383
Usernames not recognised	944	1,038	434	879	976	452	431	573	1,119
Disabled accounts	133	207	60	103	94	67	65	65	94
People viewing documents	438	103	241	430	102	495	277	583	832

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



Month	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
<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
Deferred member unsatisfied with the delayed response from Lambeth Pensions in payment of transfer value.	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)	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
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	Yes

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.