

## PENSION ADMINISTRATION PERFORMANCE MARCH 2022

## 1. Membership Data

Membership type	Totals at 31.03.21	Totals at 30.06.21	Totals at 30.09.21	Totals at 31.12.21	Totals at 31.03.22
Active	5,016	5,002	4,977	5,002	4,962
Deferred pensioner	8,456	8,463	8,498	8,516	8,571
Pensioner	6,300	6,332	6,327	6,373	6,566
Widow/dependant	1,146	1,150	1,160	1,146	1,241
	20,918	20,947	20,962	21,037	21,340

## 2. Summary of key cases recorded on Altair Workflow between 1 July 2021 to 31 March 2022

Case type	Total cases completed Jan to Mar 22	Target days to complete	Percentage completed within target Jul to Sep 2021	Percentage completed within target Oct to Dec 2021	Percentage completed within target Jan to Mar 2022	Rating >= 95% Green >= 90% Amber < 90% Red	Comments
Deferred benefit estimates & actuals	135	10	95%	90%	95%	↑	Higher than average deferred cases.
Deaths	71	10	90%	90%	96%	↑	
Retirement estimates & actuals	247	8	90%	91%	91%	↔	Higher than average deferred cases.
Transfers in / out estimates & actuals	132	25	75%	81%	77%	↓	Recent legislative changes requiring extra steps to be taken before transferring pension rights have meant that processes have taken a little longer to complete.
Refunds	76	10	95%	100%	97%	↓	Higher than average deferred cases.

### 3. 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.

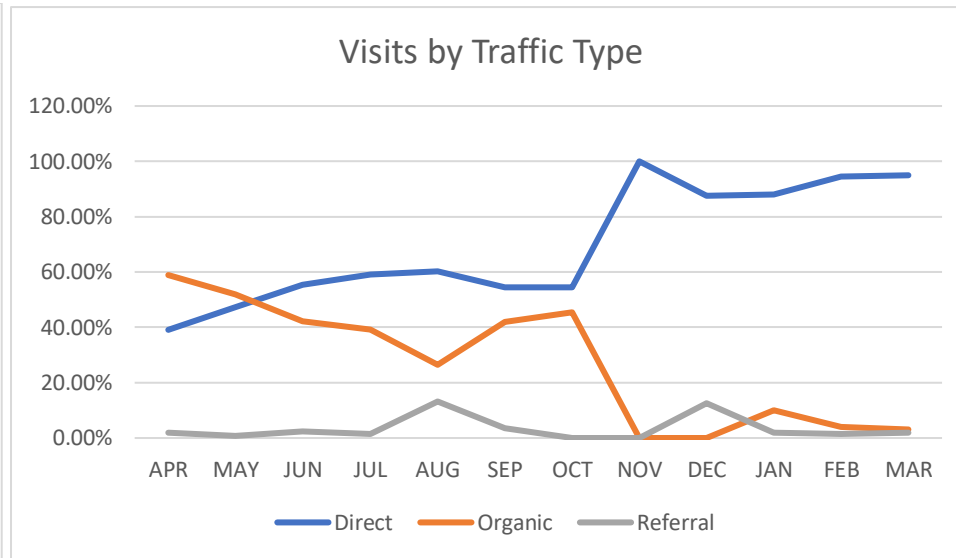
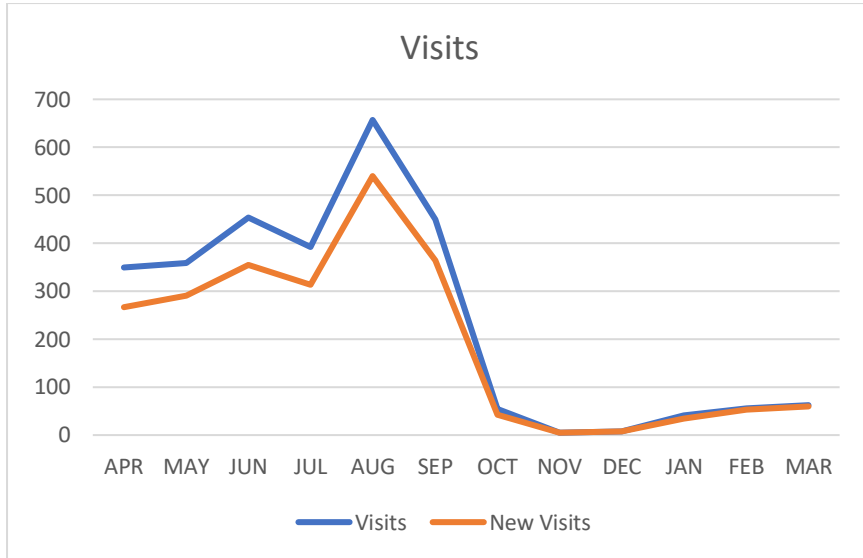
Type of member	Number of MSS users at 31.03.21	Number of MSS users at 30.06.21	Number of MSS users at 30.09.21	Number of MSS users at 31.12.21	Number of MSS users at 31.03.22	Increase since 31.12.22	*Percentage of users by membership type at 31.03.22
Active	1,222	1,253	1,274	1,292	1,293	1	26.06%
Deferred	668	713	798	964	1,061	97	12.38%
Pensioners	937	994	1,031	1,189	1,265	76	19.27%
Widow/dependant	41	41	40	54	53	-1	4.27%
Totals	2,868	3,001	3,143	3,499	3,672	173	17.21%

\*Membership: 4,962 actives; 8,571 Deferred Pensioners; 6,566 Pensioners; 1,241 Widow/dependants.

A summary of activity that compares the periods to 2022 is given in the table below.

Activities	Jan 2021 to Mar 2021	Apr 2021 to Jun 2021	Jul 2021 to Sep 2021	Oct 2021 to Dec 2021	Jan 2022 to Mar 2022
Number of log ins	1,089	1,668	1,832	1,293	1,705
First Time Logins	126	127	248	97	142
Incorrect passwords	286	311	383	278	327
Usernames not recognised	431	573	1,119	1,119	672
Disabled accounts	65	65	94	55	55

4. Lambeth Pension Fund [website](#) statistics during 2021-22



Month	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR
<b>Visits</b>	350	359	454	392	657	450	55	*5	*8	41	56	62
<b>New Visits</b>	267	291	355	313	540	364	42	5	8	35	53	60
<b>Page Views</b>	442	454	571	460	798	531	72	5	8	78	68	81
<b>Visits by traffic type</b>												
<b>Direct</b>	39.10%	47.40%	55.50%	59.20%	60.30%	54.40%	54.50%	100%	87.50%	88.00%	94.60%	95.00%
<b>Organic</b>	58.90%	51.80%	42.10%	39.30%	26.50%	42.00%	45.50%	0%	0%	10%	4%	3%
<b>Referral</b>	2%	0.80%	2.40%	1.50%	13.20%	3.60%	0%	0%	12.50%	2%	1.40%	2.00%

\*Visits by traffic type – 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.

\*\* There was an issue with the website statistics in these months, which the website provider has resolved although site visit numbers still appear to be low.

**5. Complaints and Compliments**

<b>Complaint</b>	<b>Response</b>	<b>Open/Closed</b>
Pensioner unhappy at reduction applied to his pension from April 2022 as a result of the GMP reconciliation exercise.	Explained that by law we must reduce the pension, reiterating the sympathetic approach taken not recover the overpayment.	Closed

<b>Compliment</b>
Email from member thanking SL for her diligence in spotting an error he had made with his sort code for payment to be made and contacting him to rectify showing care in managing his pension.
Member phoned to speak to a manager to say what fantastic service she had received from KG, she was very kind and went above and beyond to both resolve the member's query and also reassure her that the necessary action had been taken.

## 6. Breaches – Pensions Administration 2021

The table below is an extract of the Breaches Log for 2022 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
01.10.21	Signed agreements for one new Scheme Employer not yet received.	Yes	Continual dialogue with employer to ensure relevant documentation is signed and returned to the Fund as soon as possible. The employer has agreed to the terms and requirements as a Scheme Employer and paying over the monthly contributions.	Ongoing	Amber	Liabilities spread across the Fund's remaining employers in the event of an employer failing without sufficient security.	Open	No
12.01.22	Information emailed to incorrect member with the same name	Yes	The email was deleted by the incorrect recipient and the correct member informed of the breach. This was also reported to the Council's Information Security Team.	20.10.21	Green	Member complaint.	Closed 12/01/2022	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, with the exception of the first breach, are not being reported. Further reference to the materiality of breaches (RAG rating) can be found in the Lambeth Pension Fund [Policy for Reporting Breaches of the Law](#).