



LOCAL PENSION BOARD

12 MARCH 2018

REPORT OF THE DIRECTOR OF CORPORATE RESOURCES

**PENSION FUND ADMINISTRATION REPORT – OCTOBER TO DECEMBER 2017
QUARTER**

Purpose of the Report

1. The purpose of this report is to inform the Board of relevant issues in the administration of Fund benefits, including the performance of the Pensions Section against its Performance Indicators.

Background

2. The Pensions Section is responsible for the administration of Local Government Pension Scheme benefits of the Leicestershire Pension Fund's 90,000 members.

Performance Indicators

3. Attached as an appendix to this report are the performance indicators for the Pensions Section, which form part of the Section's Service Plan and have been agreed by the Director of Finance. These indicators are split into 2 broad categories – how quickly processes are carried out and how customers feel they have been kept informed and treated by staff.

Performance of Pensions Section

4. The results for the October to December 2017 quarter are detailed within the Appendix. Customer satisfaction remains good and overall performance figures remain positive in the quarter.

Administration

5. **General Workloads**

The tables show the position in five key work areas, October to December.

October 2017

Area	Cases completed in the period	Remaining cases at the end of the period	KPI Maximum - cases at the end of the period
Preserved benefits	289	819	900
Aggregations	226	225	1000
Interfunds in	19	181	150
Retirements	377	464	500
Deaths	46	85	100

November 2017

Area	Cases completed in the period	Remaining cases at the end of the period	KPI Maximum - cases at the end of the period
Preserved benefits	292	711	800
Aggregations	77	555	650
Interfunds in	48	191	150
Retirements	374	475	500
Deaths	76	76	100

December 2017

Area	Cases completed in the period	Remaining cases at the end of the period	KPI Maximum - cases at the end of the period
Preserved benefits	261	650	750
Aggregations	132	576	450
Interfunds in	38	209	150
Retirements	345	488	600
Deaths	54	85	100

6. The main point to note is;

- The delayed new starter interfaces from the County and City were run in December 2017 and January 2018. This has significantly increased the aggregation cases. As at the 31 January 2018 the number of remaining cases was 855. The KPI target for aggregations at the 31 January 2018 is 300. The Pension Section is recruiting for a temporary Pension Assistant to work primarily on aggregations.

GMP reconciliation

7. The work on the national GMP reconciliation exercise continues. After working for 40 years in the Pension Section the member of staff working on this project retires in March 2018. Her replacement has been recruited from within the Pension Section and both colleagues are working together to guarantee a successful handover of the project.

The current position for the GMP project is detailed in the table below;

Membership Type	Cases with Pensions	Cases with HMRC	Stalemate Cases*
Pensioner and Preserved	523	276	0
Active	31,542	0	0

*After investigation by the Fund and HMRC the case cannot be resolved.

Recommendation

8. It is recommended that the Board notes the report.

Equality and Human Rights Implications

None specific

Appendix

Quarterly Results – October to December 2017

Officers to Contact

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