

## London Borough of Hammersmith & Fulham

**Report to:** Pension Fund Committee

**Date:** 23 November 2021

**Subject:** Pension Administration Performance Update

**Report of** Eleanor Dennis, Pensions Manager

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### Executive Summary

1.1 This paper sets out a summary of the performance of Surrey County Council (SCC) in providing a pension administration service to the Fund. The Key Performance Indicators (KPI's) for the period January 2021 – September 2021 inclusive are shown in the Appendix 1.

### Recommendations

1. The Pension Fund Committee is asked to consider and note the contents of this report.
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**Wards Affected:** None

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### H&F Priorities

Our Priorities	Summary of how this report aligns to the H&F Priorities
<ul style="list-style-type: none"><li>• Being ruthlessly financially efficient</li></ul>	Ensuring good governance for the Pension Fund should ultimately lead to better financial performance in the long run for the Council and the council taxpayer.

### Financial Impact

- None

### Legal Implications

- None
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**Contact Officers:**

Name: Dawn Aunger  
Position: Assistant Director Transformation, Talent, and Inclusion  
Telephone: 020 7641 4136  
Email: [dawn.aunger@lbhf.gov.uk](mailto:dawn.aunger@lbhf.gov.uk)

Name: Eleanor Dennis  
Position: Pensions Manager  
Telephone: 07551680552  
Email: [eleanor.dennis@lbhf.gov.uk](mailto:eleanor.dennis@lbhf.gov.uk)

**Background Papers Used in Preparing This Report**

KPI Report

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## **1.0 KPI Performance**

- 1.1. The KPI's are as they have been set out in the delegation agreement between SCC and the London Borough of Hammersmith & Fulham (LBHF). The Pensions Manager ensures performance measures are discussed and reviewed between both parties on a monthly basis. This is in accordance with Code 14 of the Pension Regulator's Code of Practice that states that the scheme manager should hold regular meetings with their service providers to monitor performance.
- 1.2. The Pension Fund Committee should note that at the beginning of the Covid-19 pandemic, the Pension Regulator asked Fund's to work with their administrators to ensure that there was a minimum focus on the delivery of pay impacting tasks i.e. retirements, refunds, deaths and understands as a consequence delivery on other tasks such as transfers will be impacted, which is demonstrated in the Funds KPI's on transfer tasks. These areas will continue to be the focus of the SCC team during the remaining months of them providing pension administration services to the Hammersmith & Fulham Pension Fund.
- 1.3. This paper covers the performance of SCC for the period August to September 2021 in comparison to previous performance in 2021.
- 1.4. The performance for the over the last 2 months has fallen dramatically to the lowest levels this year in all areas apart from in the processing of new joiners. Although this drop in performance is very disappointing cases were processed a day or two later than the set SLA.
- 1.5. This disappointing dip in performance comes after an increase in cases meeting the SLA's particularly in areas such as deaths and retirements. This dip in performance has been discussed with SCC and the importance of maintaining KPI's during this exit period reinforced.
- 1.6. The dip in performance has primarily been as a result of a combination of poor resource management and managing the exit of other Funds and the additional tasks required to be actioned the team ahead of the exit date by SCC.
- 1.7. The performance on the processing of transfer estimates and payments continues to lag other task areas however, transfer outs are beginning to see higher performance levels reached.

## **2. Telephone Helpdesk**

- 2.1 The Pension Regulator in response to the Covid-19 pandemic has stressed the importance of pension administrators remaining accessible for members whether that be by email, telephone or post.

- 2.2 The are no defined KPI's for the SCC helpdesk in the delegation agreement other than the requirement for a telephone service that operates Monday to Friday 9am – 4pm.
- 2.3 There were 58 less calls received in August than in July (a 11% fall) and in September an additional 21 calls (a 4% rise) were received due to annual benefit statement activity. The ability to resolve most calls remains high at 90%.

### **3.0 Summary**

The KPI's for the period (January to September 2021) are now significantly below the desired level that we require from our administrators, but we are working with them to monitor these more closely and have more visibility of the processing of work.

The pensions manager works closely with the SCC team to strike a balance between exit activities, meetings KPI's and legacy work.

Despite the understanding that the Fund is choosing to exit from SCC in January 2022, in addition to other Fund exiting their services, they remain committed where possible to continue to process efficiently as many cases as possible.

Both the SCC exit team and the business as usual administration team continue to work collaboratively with us for the best interests of the Pension Fund, it's members and beneficiaries.