

Pension Advisory Board

6 March 2019

Administration Procedures and Performance

Report by Director of Finance, Performance and Procurement

Summary

This report provides a high level view of the administration process and performance in support of the Pension Fund and its members, active, deferred and retired.

Recommendation

That the Pension Advisory Board receives the report and confirms any further information that they require.

1. Background and Context

- 1.1 As the Board are aware, Capita provide the Pension Administration Service for the West Sussex Local Government Pension Fund. The administration team are based in Chichester and the County Council works closely with Capita.

2. Compliance with Scheme Regulations

- 2.1. The Terms of Reference for the Pension Advisory Board includes assisting the Scheme Manager to secure compliance with the scheme regulations and other legislation relating to the governance and administration of the scheme and any statutory pension scheme that is connected with it. The following projects are therefore considered relevant to note work being undertaken to comply with changes.

Amendment Regulations

- 2.2. On 18 December 2018 the LGPS (Miscellaneous Amendment) 2018 Regulations were laid before parliament.
- 2.3. The Regulations came into force on 10 January 2019. There are a number of the regulations that are backdated and have effect from 17 April 2018, 5 December 2005 and 13 March 2014. These Regulations amend the LGPS 2013 Regulations and the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014 by
- bringing dependents benefits in line with that of a widow in cases of same-sex marriage or civil partnership. This was in response to the Supreme Court judgement of Walker v Innospec.

- correcting an oversight in the May 2018 amendment Regulations, to allow all deferred members over the age of 55 the ability to draw their pensions early with the appropriate actuarial reductions.
- 2.4. Officers are liaising with the Pensions Team at both Capita and Hampshire to identify those individuals who are affected by these changes, to ensure that the appropriate benefits are calculated and backdated accordingly.
- 2.5. In addition, the Secretary of State was given Regulatory powers to give statutory guidance when an amendment to the Regulations is required following a Case law/Supreme Court outcome.

3. Performance

- 3.1. The principal functions of the Board's include "seeking assurance that administration performance is in compliance with the Administration Strategy". The following items are considered relevant in respect of compliance of the Fund and its employers in line with the Strategy and Regulations.
- 3.2. Details of the caseload performance reported against target are shown in Appendix A.
- 3.3. At the request of the Pension Advisory Board:
- Work completed outside of target has been included in Appendix B
 - Analysis of contribution payment receipts is shown in Appendix C
 - Details of Membership Movements (including transfers out and opt out figures) are shown in Appendix D

Compliments and Complaints

- 3.4. Details of the compliments and complaints received through the Pensions Team this information is provided to Officers on a monthly basis, which allows for them to identify any trends and service improvements that may be required.
- 3.5. A summarised report is attached at Appendix E.

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Background

[Walker v Innospec Supreme Court Judgement](#)

Appendices

Appendix A – Caseload performance reported against target

Appendix B – Work completed outside of target: Ageing analysis

Appendix C – Analysis of contribution payment receipts

Appendix D – Membership movements, Transfers Out and Opt Outs

Appendix E – Compliments and Complaints

Background papers

None