

your  
pension  
service

# CUMBRIA PENSION FUND

## Quarterly Performance Report

1 July 2019 to 30 September 2019

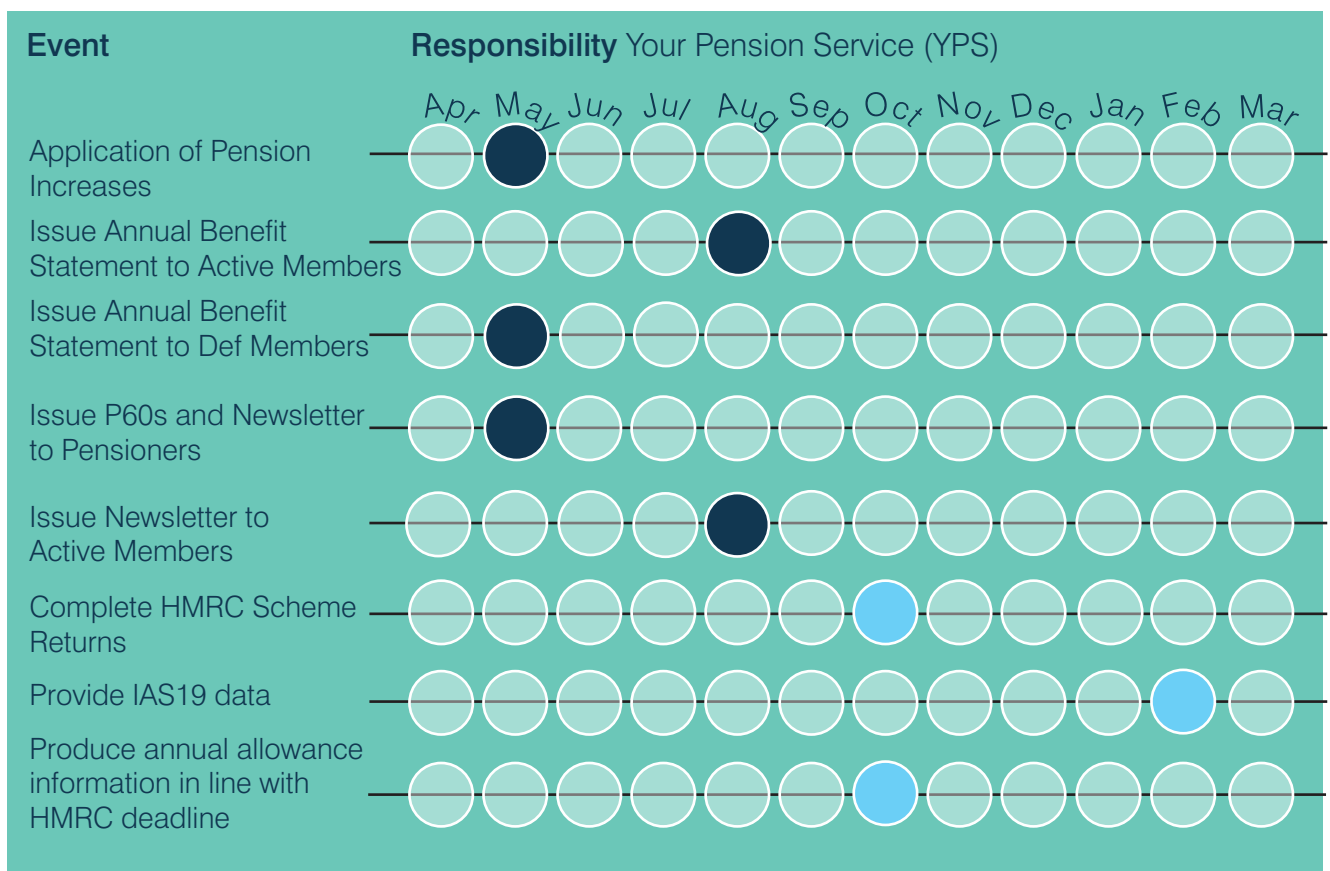


# 1. INTRODUCTION

This report sets out the performance of Your Pension Service against agreed targets. This report covers the period 1 July 2019 to 30 September 2019.

## Annual Plan – 2019/20

● Due ● Completed



## 2. PERFORMANCE STANDARDS

### LGPS

#### Service Level Agreements

The SLA performance reported in this document is based on the types of cases detailed below. However, LPP also process other case types for members of the scheme which are outlined in the SLA or are critical to providing the pensions administration service. Overall performance against all case types was 97%.

## Caseload and Performance Levels:



Target Hit



Target Miss

## LGPS

### Performance Standard

Estimate benefits within 10 working days

Cases Bf & Rec

625

Cases completed

529

Within SLA

523

% Within SLA

99%

Target

95%

Cases ongoing

96

Payment of retirement benefits within 10 working days

924

483

459

95%

95%

441

Payment of death benefits within 10 working days

450

250

246

98%

95%

200

Implement change in pensioner circumstance by payment due date

48

48

48

100%

95%

0

Respond to general correspondence within 10 working days of receipt

189

167

167

100%

95%

22

Action transfers out within 15 working days

311

223

220

99%

95%

88

Action transfers in within 10 working days

457

187

186

99%

95%

270

Pay refunds within 10 working days

529

402

397

99%

95%

127

Provide leaver statement within 15 days

1,478

735

692

94%

95%

743

Amend personal records within 10 working days

191

183

183

100%

95%

8

5,202

3,207

3,121

97%

1,995

Please see table below for a breakdown of cases outstanding:

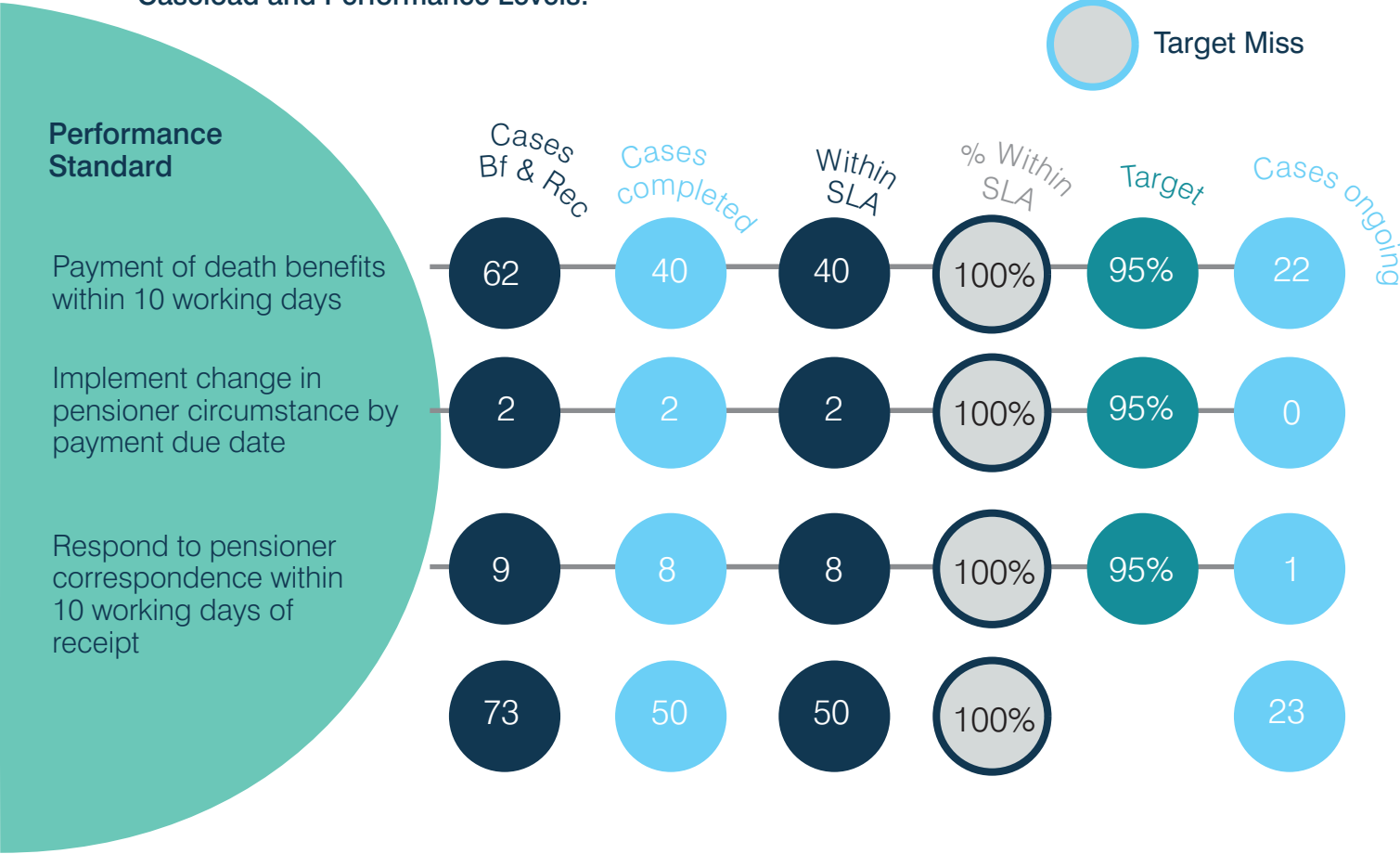
Reason	Payment of Retirement Benefits	Payment of Death Benefits	Total of Cases Ongoing
In progress (LPP can progress)	176	93	1,242
Awaiting member	210	53	316
Awaiting employer	42	13	279
Awaiting third party	13	41	158
<b>Total</b>	<b>441</b>	<b>200</b>	<b>1,995</b>

Cases processed and performance standards for Teachers and Fire are shown on the following pages.

## Teachers (Pensioners)

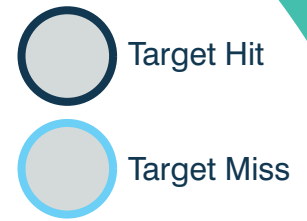
In summary 50 individual calculations/enquiries were completed during the period and 50 met the performance standard; an overall performance of 100% was achieved.

### Caseload and Performance Levels:



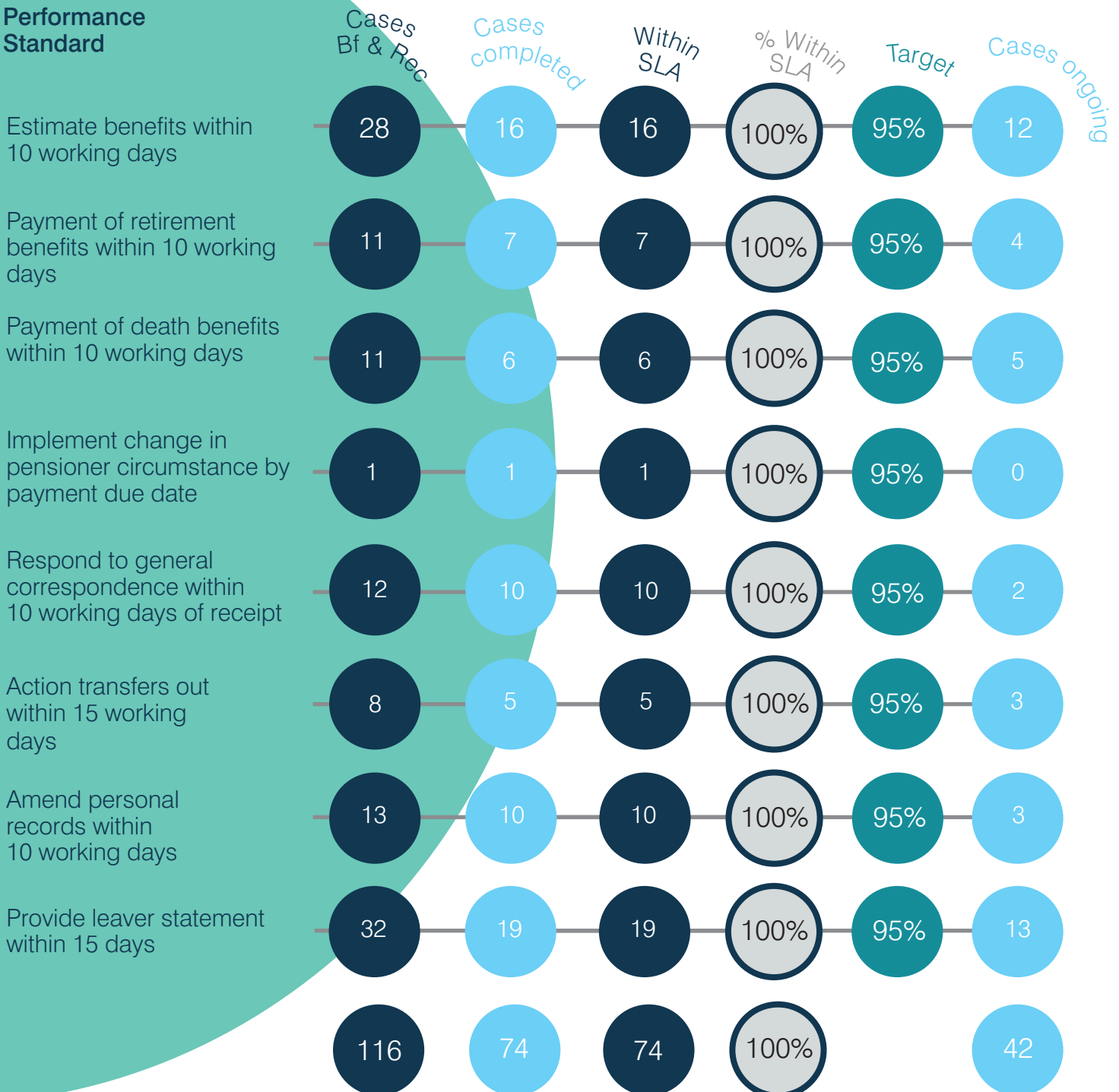
## Fire (Old and New Scheme)

In summary 74 individual calculations/enquiries were completed during the period and 74 met the performance standard; an overall performance of 100% was achieved.



### Caseload and Performance Levels:

#### Performance Standard



### 3. MEMBERSHIP

The tables below show details of membership under administration as of 30 June 2019 and 30 September 2019.

#### LGPS

	Membership at 30.06.2019	Q2 Net Changes	Membership at 30.09.2019
Active	16,280	-130	16,150
Deferred	25,111	+ 63	25,174
Pensioner	16,377	+247	16,624
Total	57,768	+180	57,948

As at 30 September 2019, there were 3,094 pending leavers within the fund, and of those we have received 730 leaver forms. The membership numbers above assume that all the pending leavers will become deferred members once the records have been updated.

## My Pension Online

Total membership currently signed up to My Pension Online

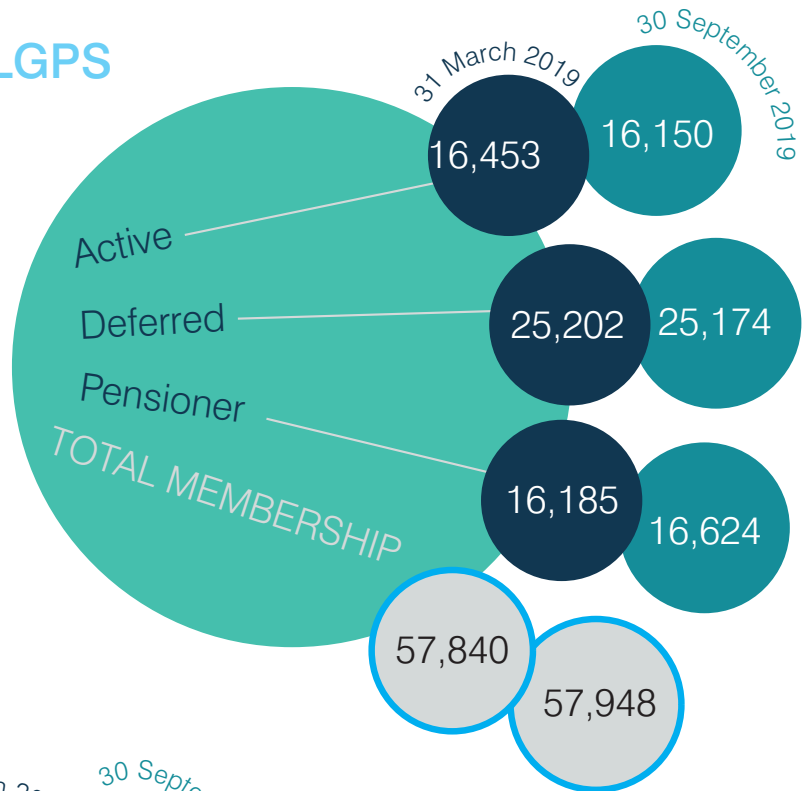
### LGPS

	March 2019	% of membership	September 2019	% of membership
Active	6,818	41%	7,131	44%
Deferred	5,626	22%	5,684	23%
Pensioner	6,498	40%	6,848	41%
<b>Total</b>	<b>18,942</b>	<b>33%</b>	<b>19,663</b>	<b>34%</b>

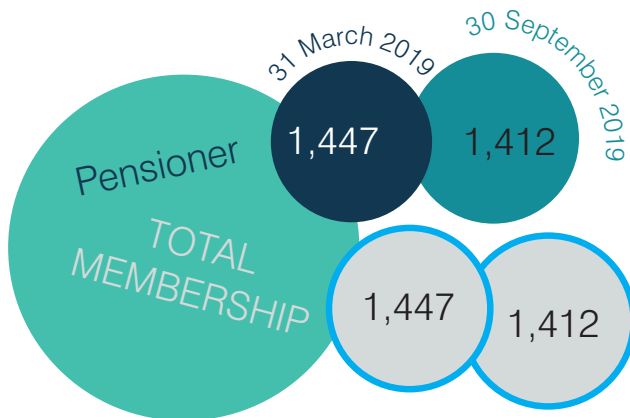
### FIRE

	March 2019	% of membership	September 2019	% of membership
Active	173	34%	169	31%
Deferred	85	27%	102	30%
Pensioner	276	56%	282	56%
<b>Total</b>	<b>534</b>	<b>40%</b>	<b>553</b>	<b>40%</b>

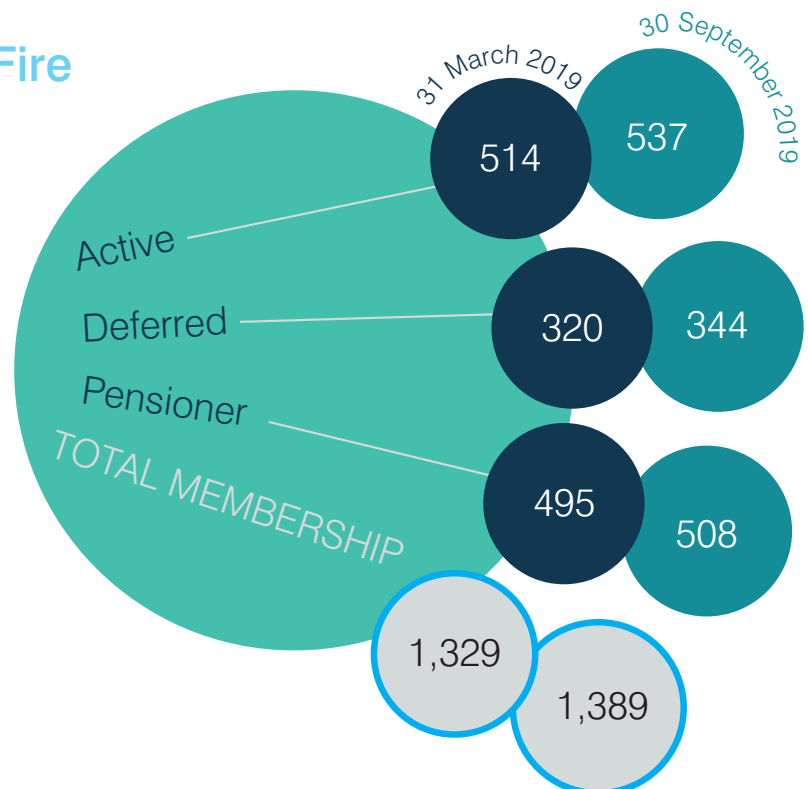
## LGPS



## Teachers



## Fire





## 4. COMMUNICATIONS

### Engagement

Communications are delivered by the Engagement Team, they are the link between Your Pension Service, scheme members and employers.

### Employers

**Employer engagement activity for 1 July 2019 to 30 September 2019**

Activity	Numbers Delivered
Employer Visit	2
ESS Training	1

### Scheme member

**Member engagement activity for 1 July 2019 to 30 September 2019**

Activity	Numbers Delivered
Stall Holder	3

# 5. CUSTOMER SERVICE

## Retirement Experience

This section looks at the number of new retirees during the quarter and an average measure of the number of working days between the retirement date and first payment date to the member.

Average 63 days  
to payment  
of pension

326 new  
pensioners

## Compliments/Complaints

3 compliments

15 complaints







The compliments received related to the helpful, friendly and professional service provided by the staff within Your Pension Service.

A high proportion of the complaints related to delays in the payment of benefits and not meeting the member's expectations.







## Customer Satisfaction Surveys

Customer surveys are used to measure satisfaction following interaction with the service. Results for the period 1 July 2019 to 30 September 2019 are shown below:

**Retirement Survey** The below results are for LGPS Cumbria members with a response rate of 40%:

<b>Retirement Experience - LG</b>						Overall Rating
Number of respondents	15	16	5	5	11	
Percentage of respondents	29%	31%	10%	10%	21%	Average

The below results are for Cumbria Fire and Rescue members with a response rate of 14.28%:

<b>Retirement Experience - Fire</b>						Overall Rating
Number of respondents	1	0	0	0	0	
Percentage of respondents	100%	0%	0%	0%	0%	Satisfied

## Contact Centre

The dedicated Contact Centre is the first point of contact for both scheme members and employers. Over the period 98% of LGPS and 92% of Fire calls were successfully answered against a target of 90%. Call wait time commences from when the call is connected.

Cumbria LGPS	
Total Calls answered	3,190
Connect Rate	98%
Call Waiting (Max)	00:11:07
Call Waiting (Avg)	00:01:27

Cumbria Fire	
Total Calls answered	129
Connect Rate	92%
Call Waiting (Max)	00:12:54
Call Waiting (Avg)	00:02:18

## Call Category

Cumbria LGPS	
General Enquiries	2,767
Pensions Online and P60	423

Cumbria Fire	
General Enquiries	111
Pensions Online and P60	18