

Lincolnshire Pension Fund

1.0 Scheme Information

1.1 Membership numbers in the Lincolnshire Fund are as follows:

Numbers	Active	Deferred	Undecided	Pensioner	Frozen
LGPS	22,641	27,703	828	23,172	2,662
Percentage of Membership	29.40	35.98	1.07	30.09	3.46
Change from Last Quarter	-65	-444	-179	+666	+28

Undecided is someone who has left their employment but is **undecided as to the action that they now want to take with regard to their pension benefits.*

1.2 Number of Employers in the Lincolnshire Pension Fund

Scheduled		As at 31.3.18	Number Admitted	Changes +/-	Number Leaving	As at 31.3.19
Schedule 1	Local Authorities	17	0	0	0	17
	Academies	154	10	0	0	164
	Others – active	34	0	1	2	33
	Others – defunct	73	0	2	0	75
Schedule 2	Town and parish Councils	27	0	0	1	26
	Others – actives	0	0	0	0	0
	Others – defunct	5	0	0	0	5
Total Scheduled		310	10	3	3	320
Admitted						
Admission		31	2	0	1	32
Others	Actives	0	0	0	0	0
	Defunct	15	0	0	0	15
Total Admitted		46	2	0	1	47

2.0 Member Contact

2.1 Over the quarter July to September we received **2** online customer responses.

Over the same quarter **190** Lincolnshire member's sample survey letters were sent out and **25 (13.2%)** returned:

Overall Customer Satisfaction Score;

July to September 2018	October to December 2018	January to March 2019	April to June 2019	July to September 2019
81.6%	81%	81.3%	83.5%	87.9%

Appendix 1 – Customer survey results.

3.0 Internal Disputes Resolution Procedures

- 3.1 All occupational pension schemes are required to operate an IDR. The LGPS has a 2-stage procedure. Stage 1 appeals, which relate to employer decisions or actions, are considered by a person specified by each employer to review decisions (the 'Adjudicator'). Stage 1 appeals relating to appeals against administering authority decisions or actions are considered the Pension Fund Manager. Stage 2 appeals are considered by WYPF.

Stage 1 appeals against the fund

No appeals currently outstanding.

Stage 1 appeals against scheme employers

Two appeal decision in this period. One appeal currently outstanding.

Date of appeal	Reason for appeal	Current position /Outcome	Date decision letter sent
28/6/2019	Appeal against being refused an ill health pension.	Referred to LCC as scheme employer. Turned down.	27/8/2019
31/7/2019	Appeal against service details.	Referred to LCC as scheme employer.	
3/7/2019	Appeal against overpayment of pension.	Referred back to WYPF to contact employer to clarify how they intend to proceed with the overpayment.	1/8/2019

Stage 2 appeals

One appeal decision in this period. One appeal currently outstanding

Date application received	Reason for appeal	Current position/Outcome	Date decision letter sent
4/5/2019	Reason for employment terminating / access to unreduced benefits.	Turned down.	2/8/2019

23/9/2019	Maladministration - Incorrect ABS	Being worked on.	
-----------	-----------------------------------	------------------	--

Ombudsman

3.2 One case outstanding

Date application received	Details of complaint	Current position/outcome	Date complete
5/7/2019	Appeal against service used in pension calculation.	Being dealt with by LCC Legal. Information provided to them. Further information provided to LCC Legal in September.	

4.0 Data Score

4.1 As part of the annual return to The Pensions Regulator (TPR) WYPF is required to report a data quality score by measuring the quality of our data for common data and scheme specific data. The latest scores are:

Common	95.69%
Scheme Specific	73.05%

This is reduction on the scores measured in September which were:

Common	96.12%
Scheme Specific	85.69%

4.2 The reduction in the common data scores is primarily due to an increase in missing addresses as a result of sending out deferred benefit statements.

4.3 The reduction in the scheme specific data scores is due to additional checks undertaken as a result of revised guidance received from the Pensions Regulator and the Scheme Advisory Board, and the WYPF programme not picking up the correct fields on some new data elements. This is due to the late receipt of the specification from MHCLG which meant that WYPF's programmes were not thoroughly tested. This will be rectified in time for the next quarter.

Appendices

These are listed below and attached at the back of the report	
Appendix A	Customer survey results