

## 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	23,166	25,371	714	25,514	2,500
Percentage of Membership	29.98	32.84	0.92	33.02	3.24

*\*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 Employer Activity - During 1 July 2021 to 30 September 2021

New Academies and Education Trusts	3
New Town and Parish Council	1
New Admission Bodies	1
<b>Total of New Employer</b>	<b>5</b>
Employers Exited	1
<b>Total Numbers of employers</b>	<b>300</b>

### 2.0 Member Contact

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

Over the quarter July to September, **132** Lincolnshire member's sample survey letters were sent out and **16 (12.2%)** returned:

Overall Customer Satisfaction Score;

July to September 2020	October to December 2020	January to March 2021	April to June 2021	July to September 2021
94.9%	82.1%	86.8%	81.7%	96.9%

Appendix A – Customer surveys

### 3.0 Internal Disputes Resolution Procedures

3.1 Stage 1 appeals against the fund

One appeal currently outstanding.

<b>Date of appeal</b>	<b>Reason for appeal</b>	<b>Current position /Outcome</b>	<b>Date decision letter sent</b>
17/06/2021	Appeal against the decision not to allow a late transfer in.	Appeal turned down. Satisfied that the correct procedure had been followed in accordance to the discretionary policy in deciding to turn down a late request for transfer.	17/08/2021
03/08/2021	Appeal against the decision of who the recipients of a death grant should be.	Turned down	13/10/2021

### 3.2 Stage 1 appeals against scheme employers

Two appeals are currently outstanding.

<b>Date of appeal</b>	<b>Reason for appeal</b>	<b>Current position /Outcome</b>	<b>Date decision letter sent</b>
02/12/2020	Appeal against being refused an ill health pension.	Referred to Serco as the scheme employer. 2 <sup>nd</sup> medical review being arranged.	Serco now confirmed that this issue has been concluded with the 2 <sup>nd</sup> medical opinion and a ill health pension has been awarded – 22/11/2021.
28/04/2021	Appeal against being refused an ill health pension.	Referred to Lincoln College as the scheme employer. Requested copy of decision letter from Lincoln College once issued – 29/04/2021.	Further queries re ill health process from the College, responded to on 26/07/2021. Last chased up – 16/11/2021

### 3.3 Stage 2 appeals

Two appeals are currently outstanding.

<b>Date application received</b>	<b>Reason for appeal</b>	<b>Current position/outcome</b>	<b>Date decision letter sent</b>
07/06/2021	Appeal against transfer out being allowed to proceed.	Turned down	4/10/2021
08/06/2021	Appeal against decision re ill health retirement.	Awaiting further information from employer	Reminder sent 06/10/2021.

### 3.2 Ombudsman

No appeals

### 4.0 Web Registrations

The number of members registered for online member web are:

Active	7757	33.48%
Deferred	5774	22.76%
Pensioner	5205	20.40%

### Appendices

These are listed below and attached at the back of the report

Appendix A	Customer survey results
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