


Report Title:	Administration Report	www.rbwm.gov.uk  Royal Borough of Windsor & Maidenhead
Contains Confidential or Exempt Information?	NO - Part I	
Member reporting:	Councillor Sharpe, Chairman Berkshire Pension Fund Committee and Pension Fund Advisory Panel	
Meeting and Date:	Berkshire Pension Fund Committee and Pension Fund Advisory Panel – 14 June 2021	
Responsible Officer(s):	Kevin Taylor, Pension Services Manager, Philip Boyton, Pension Administration Manager	
Wards affected:	None	

REPORT SUMMARY

This report deals with the administration of the Pension Fund for the period 1 January 2021 to 31 March 2021. It recommends that Members (and Pension Board representatives) note the Key Administrative Indicators throughout the attached report.

Good governance requires all aspects of the Pension Fund to be reviewed by the Administering Authority on a regular basis. There are no financial implications for RBWM in this report

1. DETAILS OF RECOMMENDATION(S)

RECOMMENDATION: That Committee notes the report and:

- (i) All areas of governance and administration as reported**
- (ii) All key performance indicators**

Please note that Administration Reports are provided to each quarter end date (30 June, 30 September, 31 December and 31 March) and presented at each Committee meeting subsequent to those dates.

2. REASON(S) FOR RECOMMENDATION(S) AND OPTIONS CONSIDERED

- 2.1 The Berkshire Pension Fund Committee has a duty in securing compliance with all governance and administration issues.

3. KEY IMPLICATIONS

- 3.1 Failure to fulfil the role and purpose of the Administering Authority could lead to the Pension Fund and the Administering Authority being open to challenge and intervention by the Pensions Regulator.

4. FINANCIAL DETAILS / VALUE FOR MONEY

- 4.1 Not applicable.

5. LEGAL IMPLICATIONS

5.1 None.

6. RISK MANAGEMENT

6.1 None.

7. POTENTIAL IMPACTS

7.1 Equalities: Equality Impact Assessments are published on the [council's website](#)
N/A

7.2 Climate change/sustainability: N/A

7.3 Data Protection/GDPR. N/A

8. CONSULTATION

8.1 Not applicable.

9. TIMETABLE FOR IMPLEMENTATION

9.1 Not applicable.

10. APPENDICES

10.1 This report is supported by 0 appendices

11. BACKGROUND DOCUMENTS

11.1 This report is supported by 0 background documents.

12. CONSULTATION (MANDATORY)

Name of consultee	Post held	Date issued for comment	Date returned with comments
Cllr. Julian Sharpe	Chairman – Berkshire Pension Fund Committee		
Adele Taylor	Director of Resources and s151 Officer		
Andrew Vallance	Head of Finance and Deputy s151 Officer		
Ian Coleman	Interim Pension Fund Manager		

REPORT HISTORY

Decision type:	Urgency item?	To follow item?
Pension Fund Committee decision	Yes/No	Yes/No

Report Author: Kevin Taylor, Pension Services Manager 07992 324393
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**THE ROYAL COUNTY OF
BERKSHIRE
PENSION FUND**

ADMINISTRATION REPORT

QUARTER 4 – 2020/21

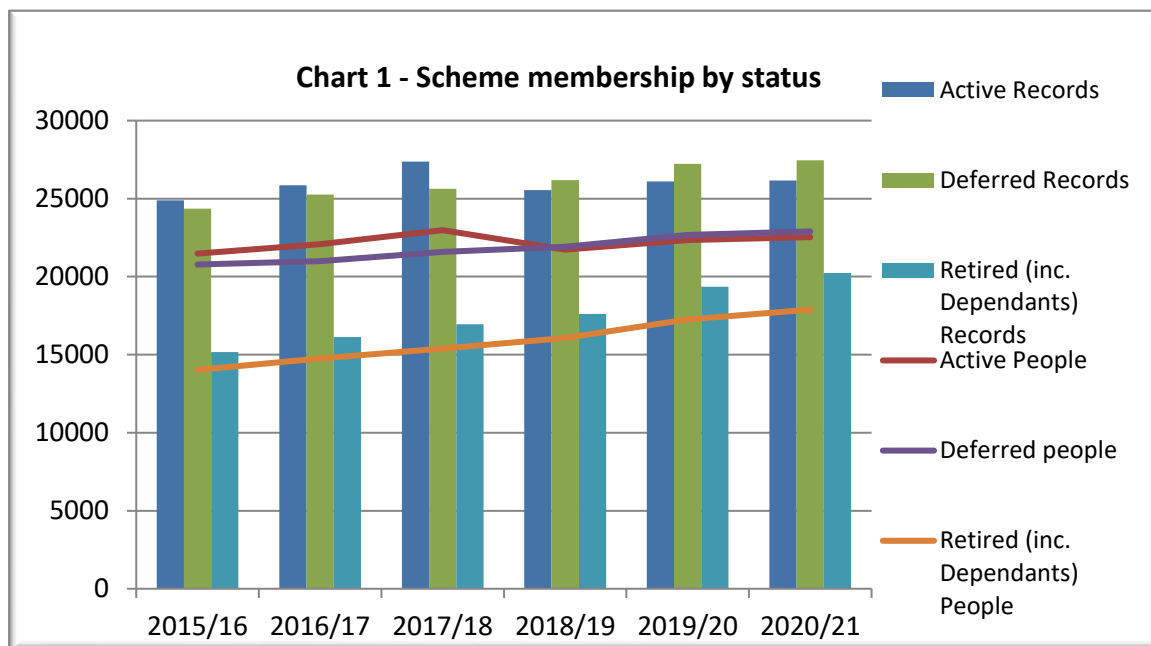
1 January 2021 to 31 March 2021

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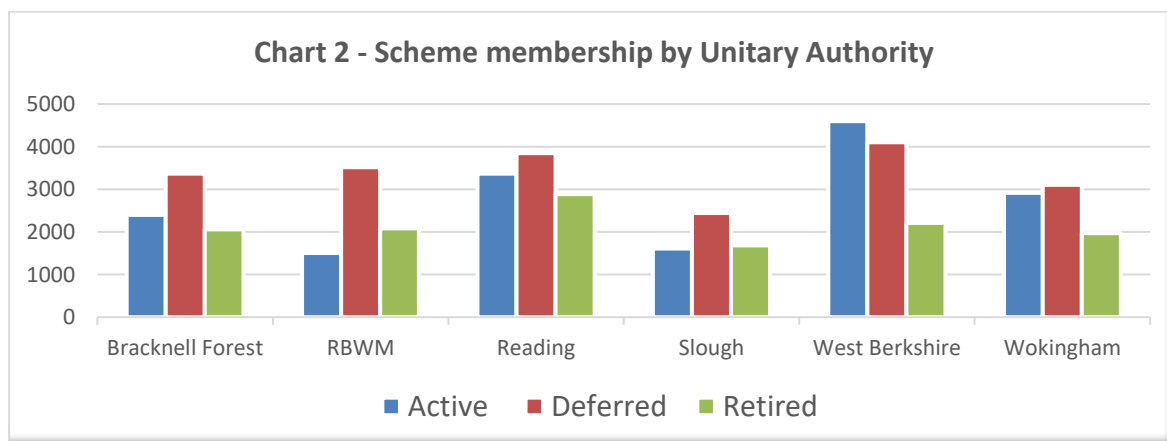
1. ADMINISTRATION

1.1 Scheme Membership



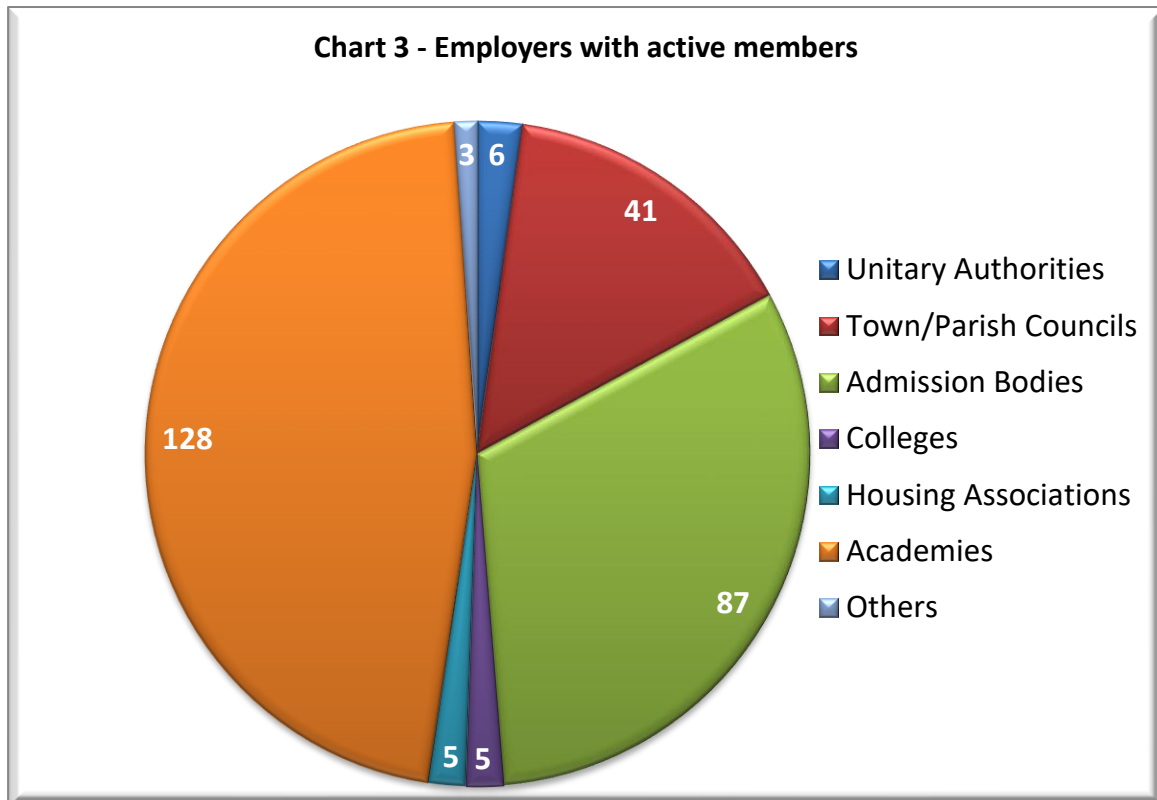
TOTAL MEMBERSHIP			
Active Records	26,154	Active People	22,524
Deferred Records	27,451	Deferred People	22,898
Retired Records	20,227	Retired People	17,855
TOTAL	73,832	TOTAL	63,277

1.2 Membership by Employer



Membership movements in this Quarter (and previous Quarter)						
	Bracknell	RBWM	Reading	Slough	W Berks	Wokingham
Active	+27 -39	-10 +3	+19 -1	-61 -22	+13 +221	-13 -31
Deferred	-23 -27	+3 -32	-6 -35	-22 -49	-18 -1	-11 -3
Retired	+27 +80	+24 +53	+29 +101	+10 +46	+31 +96	+32 +72

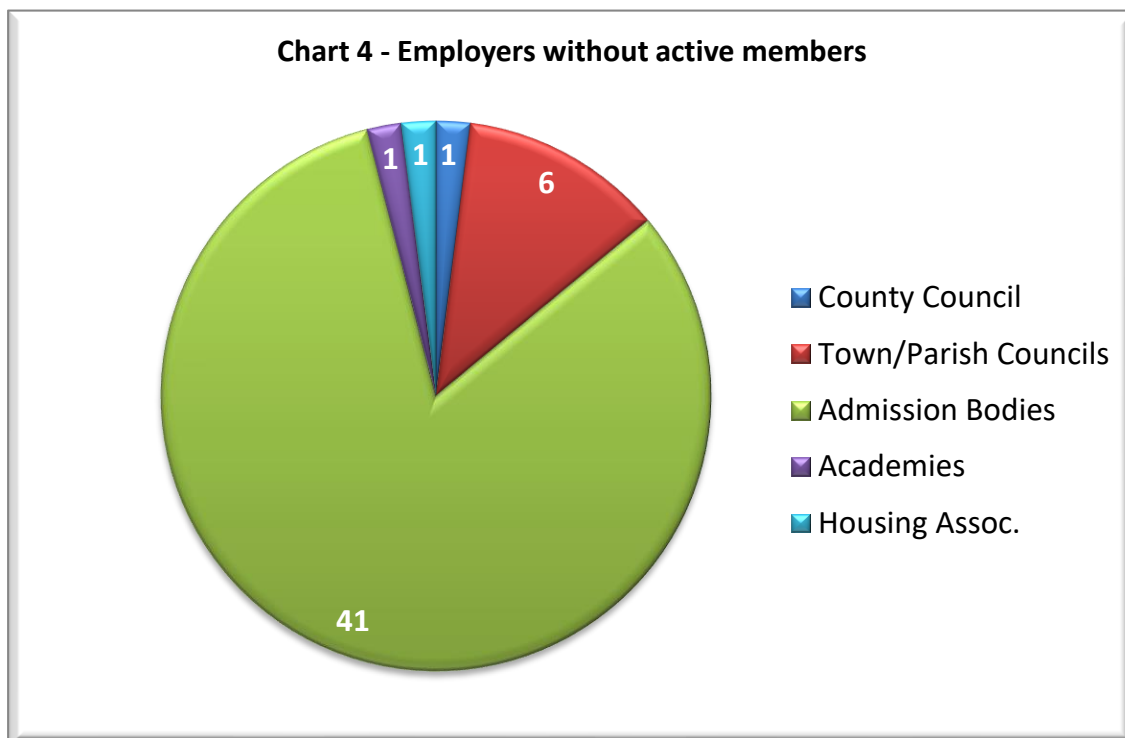
1.3 Scheme Employers



New employers since last report:

Admission Bodies: Thomas Coram Foundation

Academies: Khalsa Primary School



Exiting employers: Northgate Information Solutions

1.4 Scheme Employer Key Performance Indicators

Table 1A – i-Connect users Quarter 4 (1 January 2021 to 31 March 2021)					
Employer	Starters	Leavers	Changes	Total	Submission Received Within Specification
Bracknell Forest Cncl	134	75	232	441	100%
RBWM	93	75	146	314	100%
Reading BC	157	101	279	537	100%
Slough BC	50	94	132	276	100%
West Berks Council	288	193	401	882	100%
Wokingham BC	145	51	244	440	100%
Academy/ School	399	374	3,100	3,873	75.80%
Others	92	93	173	358	96.25%
Totals	1,358	1,056	4,707	7,121	

NOTES: Table 1A above shows all transactions through i-Connect for the fourth quarter of 2020/2021. Changes include hours/weeks updates, address amendments and basic details updates.

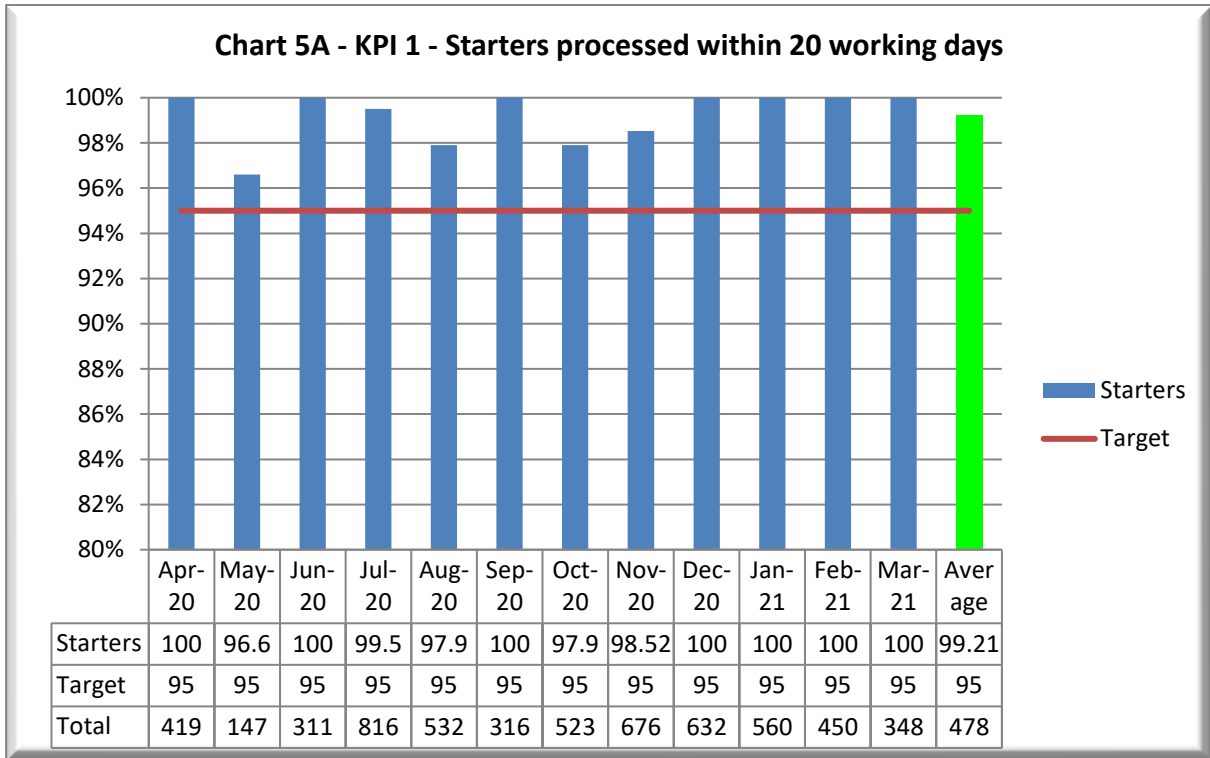
The benefits of i-Connect are:

- Pension records are maintained in ‘real-time’;
- Scheme members are presented with the most up to date and accurate information through *mypension* ONLINE (Member self-service);
- Pension administration data matches employer payroll data;
- Discrepancies are dealt with as they arise each month;
- Employers are not required to complete year end returns;
- Manual completion of forms and input of data onto systems is eradicated removing the risk of human error.

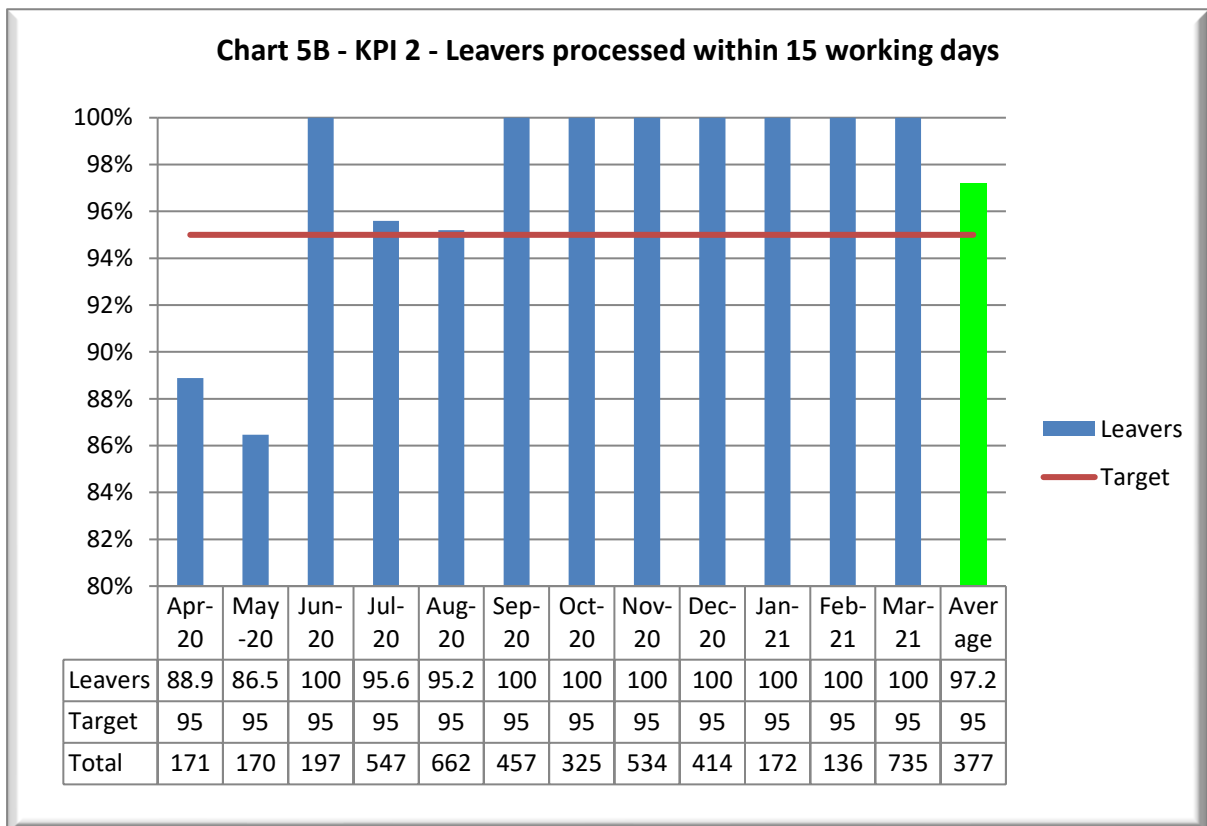
144 scheme employers are yet to on board i-Connect. Of these 31 individual scheme employers have more than 10 scheme members. In addition, we have 34 academies across 13 Multi-Academy Trusts (MATs) still to on-board making a total of 65 employers. (Please note that we treat the MAT as the employer so strictly there are 47 scheme employers with more than 10 scheme members still to on board but 65 employer locations held on the administration system).

The Pension Fund is committed to having all scheme employers with 10 or more scheme members uploaded to i-Connect by 31 March 2022. Scheme employers with fewer than 10 scheme members (79 employers) will also be given the option of using an on-line portal version of i-Connect by that date.

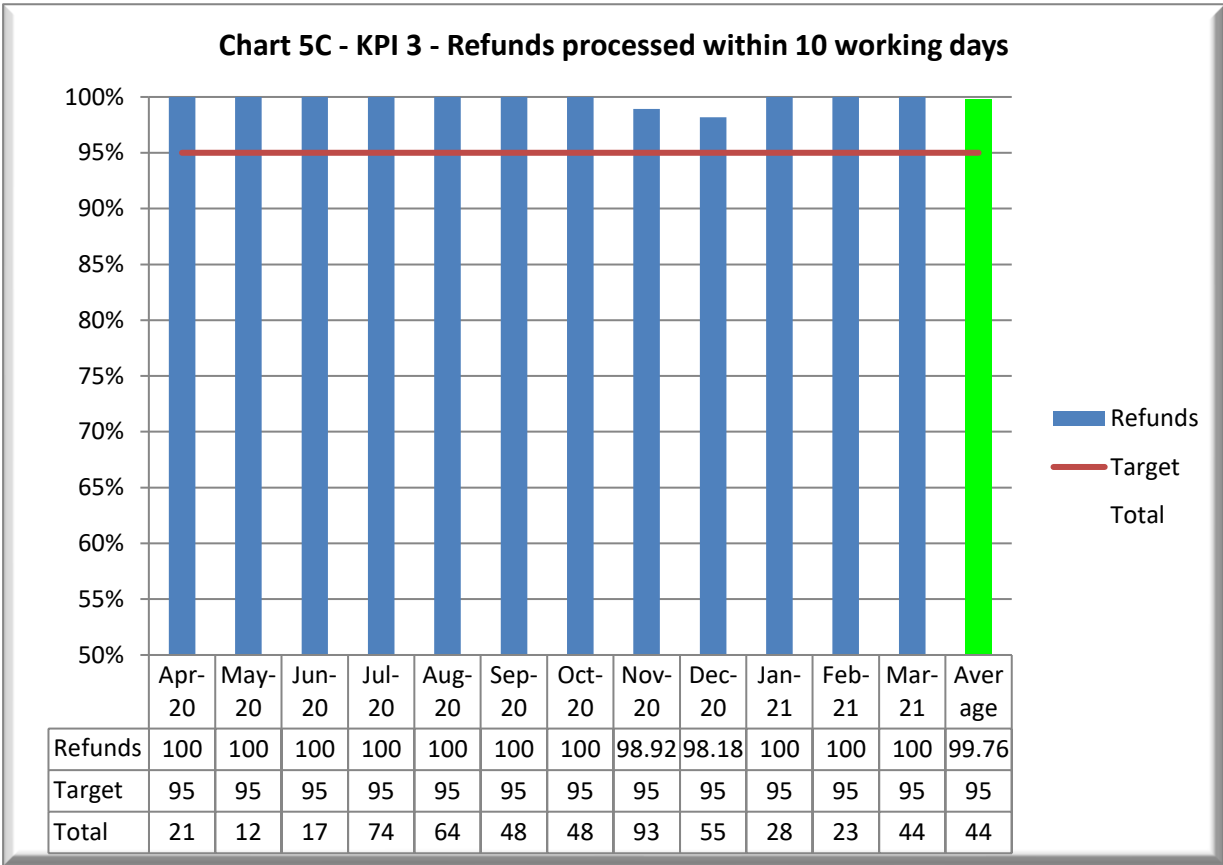
1.5 Key Performance Indicators



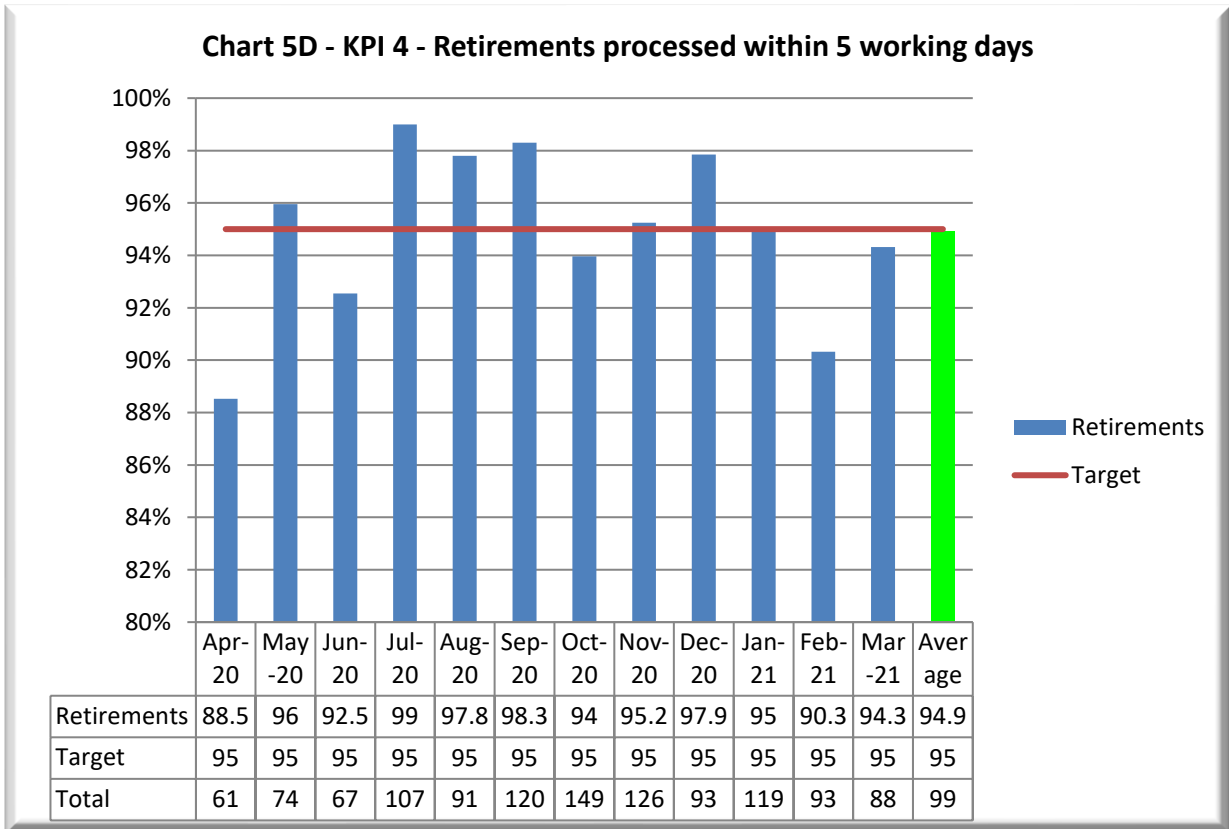
CIPFA Benchmark: Two months from date of joining the scheme or if earlier within one month of receiving jobholder information.



CIPFA Benchmark: As soon as practicable and no more than two months from date of notification from scheme employer.

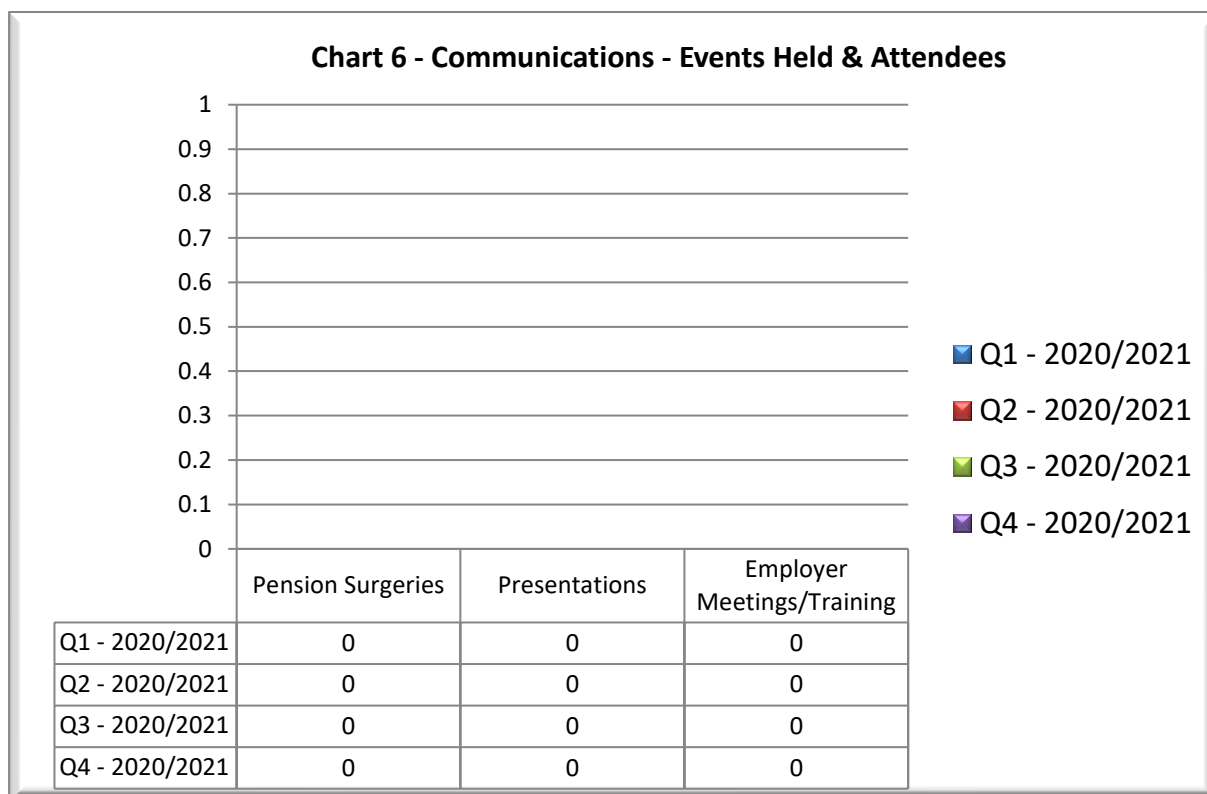


CIPFA Benchmark: To be confirmed.



CIPFA Benchmark: One month from date of retirement if on or after normal pension age or two months from date of retirement if before normal pension age.

1.6 Communications – Not reporting on these events currently



1.7 Stakeholder Feedback

As part of the Pension Fund's aim to achieve Pension Administration Standards Association (PASA) accreditation it is a requirement to report to Members the comments and complaints received from scheme employers and their scheme members on a periodic basis. Please see below feedback received from stakeholders during the fourth quarter:

Date Received	Method	Feedback
10/03/2021	E-mail	There is no need to apologise, once again excellent service from Berkshire Pensions. The problem lies entirely with the Prudential, I'm surprised they've got themselves into such a mess.
06/05/2021	Email	I also want to put on record my thanks to [NAME] for his support, advice and patience with my never-ending questions during the last 12/14 months in relation to the drafting of the Admission Agreement.

2 SPECIAL PROJECTS

2.1 McCloud Judgement

In 2014 the Government introduced reforms to public service pensions, meaning most public sector workers were moved into new pension schemes in 2014 and 2015.

In December 2018, the Court of Appeal ruled that the 'transitional protection' offered to some members of the judges' and firefighters' pension schemes, as part of the reforms, gave rise to unlawful discrimination.

On 15 July 2019 the Chief Secretary to the Treasury made a written ministerial statement confirming that, as 'transitional protection' was offered to members of all the main public service pension schemes, the difference in treatment will need to be removed across all those schemes for members with relevant service.

The changes to the LGPS include transitional protection for members who were within 10 years of their Final salary Scheme normal pension age on 1 April 2012, ensuring that they would receive a pension that was at least as high as they would have received had the scheme not been reformed to a Career Average Revalued Earnings scheme from 1 April 2014.

Like all LGPS Pension Funds we are currently analysing the membership whilst working closely with both our actuary, Barnett Waddingham, and pension software provider, heywood Limited, to identify those members impacted by this judgement leading to a recalculation of deferred and in payment scheme member benefits.

2.2 Year End 2021 Processing

In consideration of the three administrative parts of year end processing Officers can report the following to Members:

➤ Pension Increase – Deferred Pensioners and In Payment Scheme Members

Following the successful increase to deferred pensioner records Annual Benefit Statements were issued on 12 April 2021, the same day all deferred pensioner benefits increased by 0.5% in line with the Consumer Price Index (CPI).

Following the successful increase to in payment scheme member records a Pension Increase Booklet was issued to all in payment scheme members before the last working day of April 2021.

➤ Active Contributors

During week commencing Monday, 8 February 2021 Officers e-mailed those scheme employers yet to onboard i-connect the year end requirements for scheme year ending 31 March 2021. Scheme employers are asked to provide a response to the year-end requirements no later than 1 May 2021.

Annual Benefit Statements will be made available as soon as each scheme employers reconciliation is complete. Progress will be reported to Members at the next Pension Fund Committee meeting.