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Dear Mr Patel

Local Government Pension Scheme - annual benefit statements (ABSs)

I write to report that we have not been able to produce all the ABSs we should have produced by 31 August or, noting your letter of 9 October 2015 to Jeff Houston at the Local Government Association, by 30 November.

Regarding the ABSs that we did produce, we sent 163,641 by 31 August and, due to the lateness of many year-end returns from employers, a further 29,867 in November, to give a total of 193,508. Unfortunately we had approximately 7,000 that we were not able to produce. In approximately 4,000 instances this was because we believe members have left but we have not received the leaving information, not least the final pay figures, without which we cannot calculate benefits. In approximately 2,000 instances people would appear to have joined the Fund as we are receiving contributions in respect of them, but employers have not notified the details relating to their admission, eg. their dates of entry and addresses. Again without this data we cannot proceed regarding ABSs.

In approximately 1,000 cases we either do not have sufficient information to produce ABSs, eg. someone has multiple jobs but we have not been provided with sufficient information to post the right amounts of pay and contributions to the right pensionable employment, or the information we have would appear to be wrong.

Regarding correcting matters, many queries have been raised with employers, with more to arise as we work our way through the final year-end returns that were received late. As we receive data, or correct data, we are updating our records. Thereafter we will send the deferred member statements, or active member statements, as appropriate.

Regarding a timeframe, the strong desire is to have all missing information received as soon as possible, and certainly by 9 May 2016, which is when we start to process the year-end returns for 2015/16. Consequently if, for example, we haven't received missing starting details by then, then we can't post the pay and contributions for 2015/16, never mind 2014/15. We are however contacting employers that have outstanding queries to highlight that they must supply us with the data we



require. We have also conducted a survey of employers to try and identify what improvements can be made, with the aim of making the processing of the 2015/16 year-end returns, and the ensuing ABSs, far less troublesome.

As part of the preparations for the 2015/16 year-end we are carrying out some preliminary comparisons of data with our largest 20 employers. We will also offer year-end training to all 450+ employers that have active members. I am optimistic that this training, coupled with us working better generally with employers, will contribute to much better compliance with the legislation next year.

I very much regret that we have not been able to produce all our ABSs on time this year, which as you know is our first year as a career averaging scheme. We will do better next year.

If the above prompts any questions, or if you require any further information, please let me know.

Yours sincerely

G Dale
Assistant Executive Director – Pensions Administration