

Report for: Pensions Committee and Board – 17 March 2026

Item number: 9

Title: Pensions Administration Update

Report authorised by: Taryn Eves, Director of Finance and Resources (Section 151 Officer)

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Ward(s) affected: N/A

**Report for Key/
Non Key Decision:** Not applicable

1. Describe the issue under consideration

- 1.1. This report provides the Pensions Committee and Board (PCB) with the following updates regarding Pension Fund's administration activities:
- a. Pension Fund membership update
 - b. Online Member Self Service portal update
 - c. Update on Service Level Agreement (SLA) statistics
 - d. Collection of Employer and Employee Contributions update
 - e. Internal Disputes Resolution Procedures (IDRPs)
 - f. McCloud Project update
 - g. Engage portal implementation

2. Cabinet Member Introduction

- 2.1. Not applicable

3. Recommendations

The Pensions Committee and Board is recommended:

- 3.1. To note this report and the information provided regarding the Pension Fund's administration activities for the quarter ending 31 December 2025.

4. Reason for Decision

- 4.1. Not applicable.

5. Other options considered

- 5.1. Not applicable.

6. Background information

Membership Update

- 6.1. Employees working for an employer that participates in the Local Government Pension Scheme (LGPS) are eligible for membership in the scheme. Membership in the LGPS is voluntary, and members are free to choose whether to continue participating in the scheme or to make personal arrangements outside of it.
- 6.2. Table 1 provides a breakdown of Haringey Pension Fund's ("the Fund") membership on 31 December 2025.

Table 1: Pension Fund Membership

Member status	31 Mar 25	30 June 25	30 Sept 25	31 Dec 25
Active members	6,683	6,825	6,626	6,688
Pensioner members	9,254	9,367	9,472	9,579
Deferred members	10,588	10,769	10,917	10,833
Total scheme members	26,525	26,961	27,015	27,100

Online Member Self Service Portal Update

- 6.3. The Haringey Member Self Service (MSS) portal is a website where members can register an account to view/edit their personal information as well as run their own retirement estimates.
- 6.4. Table 2 provides a breakdown of the number of active members registered for the Haringey Pension Fund's Engage Portal as at 31 December 2025.

Table 2: Proportion of Active Members Registered on the Engage Portal

Member Self Service	31 Mar 25	30 June 25	30 Sept 25	31 Dec 25
Total active scheme members	6,683	6,825	6,626	6,688
Total active member registrations on MSS	1,950	2,032	2,151	2,250
Proportion of registered active members	29.17%	29.77%	32.46%	33.64%

- 6.5. Table 3 provides a breakdown of the number of members who have accessed the Engage portal over the past 7 days, 30 days, 2 months, and 3 months periods. This table is provided for information purposes only. The frequency at which members access the Engage portal depends on individual circumstances and time of the year. Individuals will have different reasons for needing access to their pension information.

Table 3: Engage Access

Period last accessed	Dec 2025
Last 7 days	91
Last 30 days	485
Last 2 months	655

* The above figures are shown on a cumulative basis

Update on Service Level Agreement (SLA) statistics

- 6.6. The Pension Fund's Service Level Agreement (SLA) sets out the agreed timeframes for the pensions administration team to process the various case work related to the pension scheme. This includes activities related to processing member retirement benefits, and transfers in and out of Haringey LGPS.
- 6.7. The agreed turnaround time varies depending on the type of case and these targets can be found in the Fund's Administration Strategy document which was recently updated to align with the CIPFA standard Key Performance Indicators (KPIs).
- 6.8. Performance against KPIs continues to be strong in key areas such as retirements and deaths. However, outcomes for both actual and quotation transfer cases, both in in or out, remain below the desired standard. This ongoing challenge is largely attributable to the concentration of case- specific knowledge within a limited number of administration officers.
- 6.9. To address this, officers are developing a structured training plan aimed at broadening the distribution of transfer- related expertise across the wider team. This will support greater resilience and is expected to improve the proportion of transfer cases completed within the target SLA.
- 6.10. Table 4 includes the current SLA statistics for the period ending 31 December 2025

Table 4: Key Performance Indicators

Process	Cases completed	SLA Days to complete	% Completed within SLA
Deaths notifying amount of dependents benefits	236	10	85%
Estimates	346	15	87%
Retirement quote	386	15	91%
Retirement Actual	322	10	93%
Deferment of records	332	30	84%
Refund quote	211	30	89%
Refund actual	67	10	85%
Transfer in Quote	291	20	65%
Transfer in Actual	151	20	69%
Transfer Out Quote	279	20	68%
Transfer Out Actual	167	20	71%
Divorce Quote	23	30	100%
Divorce Actual	1	30	100%
Actual payment of retirement lump sum	246	10	92%

Collection of Employer and Employee Contributions Update

- 6.11. Employer contributions are set every three years through an actuarial valuation, which assesses the fund's assets, liabilities, and future obligations. Contribution rates vary by employer, reflecting factors such as workforce profile, benefit levels, and funding position, ensuring contributions are fair and sufficient to maintain the scheme's long-term sustainability.
- 6.12. Employee Contributions are set nationally by legislation, employee contributions follow a tiered structure based on pensionable pay, with higher earners paying a higher percentage. These rates are reviewed periodically to maintain fairness and affordability, and are deducted directly from employees' salaries as a key part of scheme funding
- 6.13. All participating employers are required to submit monthly contribution schedules and corresponding remittances for both employee and employer contributions within the specified timeframes outlined in the Fund's Administration Strategy. Timely and accurate submissions are essential to ensure effective fund management and regulatory compliance.
- 6.14. Officers confirm that all expected payments and corresponding contribution schedules are accounted for as at the publication date of this report.

Internal Disputes Resolution Procedures (IDRPs)

- 6.15. The Internal Disputes Resolution Procedure (IDRP) provides scheme members with a formal mechanism to appeal decisions or actions taken in relation to their pension benefits. This includes, but is not limited to, the exercise of discretionary powers by the Council or participating employers. The IDRP ensures that members have access to a clear and structured process for resolving concerns in a fair and transparent manner, in accordance with regulatory requirements.
- 6.16. The dispute resolution process comprises two stages. At Stage 1, unresolved complaints are referred to the IDRP stage 1 Adjudicator for review. If the member remains dissatisfied, they may escalate the matter to Stage 2, where it will be reviewed by an independent Senior Designated Person.
- 6.17. If a complaint can still not be resolved after being reviewed via IDRP stage 1 and 2, the member then has the right to take the complaint to the Pensions Ombudsman.
- 6.18. There has been no new IDRP cases since the last update to the PCB.

McCloud Project Update

- 6.19. Since the last PCB meeting, McCloud calculations in the Altair environment have continued to be closely monitored to ensure accuracy of outputs and updates to member records. New individual member calculations have also been introduced, fully tested and are correctly updating member records for past calculations that need to be re-run to factor in the McCloud Remedy.
- 6.20. The review of responses to the mailing to approximately 4,500 members has been completed and are now awaiting replies from the other Public Service Pension

Schemes to confirm the service dates for the members that have declared such service. The review of the extensive Heywood documentation is also ongoing, alongside Hymans and Local Government Association documentation.

- 6.21. The McCloud Eligibility Reportwriter process will continue to be run on a recurring basis to ensure that newly eligible members are consistently identified. Additional associated tasks will also be scheduled as part of this ongoing work. The completion of the Annual Benefit Statement templates will be deferred pending receipt of updated documentation. Some related activities have also been impacted by this dependency.
- 6.22. Progress on Statutory Guidance Group 1–3 cases has been delayed due to vacancies within the team. These posts have now been filled, which is expected to support the project. In addition, resources were temporarily redirected to support the major migration from the Member Self- Service portal to the Engage portal, required to meet the software provider’s deadline of 31 January 2026. Despite these pressures, the project remains on track for completion.

Engage portal implementation

- 6.23. The Member Self-Service (MSS) portal reached its ‘end of life’ 31st January 2026. MSS has been replaced with a new portal called Engage. Following extensive User acceptance Testing, the Fund’s branding updates and Fund level content changes made to enhance the member experience, Engage went live for Haringey Pension Fund members on the 29th January 2026. MSS has since been fully decommissioned.
- 6.24. Communications were circulated both internally and externally to staff at all the other Employers participating in the Fund. Instructions for registering for Engage and the new and useful features were provided in the communications to encourage the Fund’s members to register. All the Fund’s information on both the Intranet and the Fund’s own website has been updated to reflect the move from MSS to Engage.
- 6.25. The feedback from the Fund’s members has been very positive. Officers plan to have an Engage promotion drive to bring the portal and it’s benefits to the attention of the Fund’s members later this year, which it is hoped will also significantly increase the number of registrations

Contribution to Strategic Outcomes

6.26. Not applicable

7. Carbon and Climate Change

7.1. Not applicable

8. Statutory Officers comments (Chief Finance Officer (including procurement), Assistant Director of Corporate Governance, Equalities)

Finance and Procurement

8.1. Not applicable.

Director for Legal and Governance [Fiona Alderman]

8.2. Director for Legal and Governance (Monitoring Officer) has been consulted on the content of this report and there are no legal implications.

Equalities

8.3. The Local Government Pension Scheme is a defined benefit open scheme enabling all employees of the Council to participate. The report's content has no direct impact on equality issues.

9. Use of Appendices

9.1. Appendix 1_McCloud Project Plan

10. Local Government (Access to Information) Act 1985

10.1. Not applicable.