PENINSULA PENSIONS PERFORMANCE REPORT

Report of the County Treasurer

Please note that the following recommendations are subject to consideration and determination by the Board before taking effect.

Recommendation: That the board notes the report and actions being undertaken by officers to ensure compliance and best practice.

1. Introduction

1.1. Our main service standard is to complete 90% of work within 10 working days once all necessary information has been received. This is monitored every month through our task management system (TMS) which is an in-house performance tool within our pension database.

1.2. We also participate in the CIPFA Benchmarking Club which provides a yearly comparison of performance with other LGPS administration services. Approximately 50 LGPS Funds take part each year.

2. Team Performance

2.1. As a whole the Team for 2016/17 issued 76% of work within target.

2.2. The backlog of outstanding work has decreased by 10% since April 2017.

2.3. Appendix 1 shows a selection of compliments and complaints including type we have had and changes we have made.

3. CIPFA Benchmarking

3.1. 2016/17 data has now been collated and forwarded to allow analysis of service compared to other LGPS providers. This includes membership analysis, Employer analysis, quotations and charges, costs and administration performance. Results are expected in December 2017.

3.2. The table below shows our internal comparison on level of service provided in 2016/17 against 2015/16. An improvement in all areas has occurred.
<table>
<thead>
<tr>
<th>Process</th>
<th>Target</th>
<th>Our 16/17 achievement</th>
<th>Our 15/16 achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer in</td>
<td>10 days</td>
<td>93.36%</td>
<td>76.0%</td>
</tr>
<tr>
<td>Transfer out</td>
<td>10 days</td>
<td>93.38%</td>
<td>83.3%</td>
</tr>
<tr>
<td>Letter notifying <strong>actual</strong> retirement benefits</td>
<td>5 days</td>
<td>98.44%</td>
<td>86.4%</td>
</tr>
<tr>
<td>Letter notifying <strong>estimated</strong> retirement benefits</td>
<td>10 days</td>
<td>93.76%</td>
<td>93.0%</td>
</tr>
<tr>
<td>Letter acknowledging death</td>
<td>5 days</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Refunds</td>
<td>5 days</td>
<td>97.9%</td>
<td>93.2%</td>
</tr>
<tr>
<td>Letter notifying dependants benefits</td>
<td>5 days</td>
<td>95.25%</td>
<td>82.0%</td>
</tr>
<tr>
<td>Deferred</td>
<td>10 days</td>
<td>82.36%</td>
<td>39.1%</td>
</tr>
</tbody>
</table>

4. **Actions Implemented**

4.1. An additional team resource approved in Autumn 2015 has been extended until 31st March 2018. Three vacancies have arisen in the team since the end of May which we have now had approval to fill.

4.2. New workflow tools have been introduced along with focusing the teams efforts initially on getting all priority work up to date. Outstanding priority work is now within 10 days old.

4.3. A Performance review is continuing looking at a number of key areas, resource levels and efficiency of processes. This is a very comprehensive review which is being undertaken with the assistance of Business Analysts.

5. **Conclusion**

5.1. We are continuing to work towards improving our performance and in turn provide an excellent service to all our stakeholders.

Mary Davis

Electoral Divisions: All
Local Government Act 1972
List of Background Papers - Nil
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