

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: The Board notes the report.

1. Introduction

- 1.1. Peninsula Pensions' internal service standard target is to complete 90% of work within 10 working days from the date that all necessary information has been received. Performance targets are monitored on a monthly basis via a task management system and reporting tool within the pension database.

2. Team Performance

- 2.1. During 2017/18, the team issued 77% of work within target. At the last meeting of the Board, we reported that performance had remained consistent at 77% for the 9 months ending 31st December 2018. Performance over January and February has increased to 83%, which brings the total performance for the 11 months ending 28th February 2019 to 78%.
- 2.2. It is pleasing to see an increase in performance, albeit marginal, as we are continuing to undertake an extensive training plan across the member services section, which is impacting the normal day-to-day workloads of staff. We are also in the process of recruiting to several vacant positions within the team which should help to improve things further going forward.
- 2.3. Appendix 1 shows the performance relating to the Devon Fund only for the 11 months ending 28th February 2019.
- 2.4. A report showing the longer-term performance is attached at appendix 2. Members will note that the total number of cases outstanding has dropped significantly over the period reported.

3. Future changes to performance reporting

- 3.1. At the February meeting of the Board, officers reported that we are in the process of reviewing and improving our methods of reporting performance.
- 3.2. Future performance reports will now include performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013, which set out the minimum requirements regarding the disclosure of pension information, in addition to our internal service standard targets.
- 3.3. Our pensions administration software, which is used to monitor performance, has now been updated to record both sets of performance targets and the reports are now in development.

- 3.4. In addition to this, officers have also completed the review of task classification and prioritisation of tasks, as discussed during the February meeting, and these revised classifications will feed into future reports. This will help to ensure that tasks are dealt with appropriately and in a more effective and timely manner.
- 3.5. Officers will bring a future report to the Board which sets out the new classification of tasks.

4. Conclusion

- 4.1. The Board is asked to note the Performance report.

Mary Davis

Electoral Divisions: All

Local Government Act 1972

List of Background Papers - Nil

Contact for Enquiries: Dan Harris / Shirley Cuthbert

Tel No: (01392) 383000

Summary of Work Completed 01/04/18 – 28/02/19 (DCC)

	Within Target	Over Target	Total	Success Rate
Priority Procedures	5,514	1,403	6,917	80%
Non-Priority Procedures	20,971	6,209	27,180	77%
TOTAL	26,485	7,612	34,097	78%

Priority Procedures

	Within Target	Over Target	Total	Success Rate
Deaths	644	273	917	70%
Employer Estimates	232	12	244	95%
Priority General	2,897	336	3,233	90%
LGPS Retirements	783	499	1,282	61%
Deferred Benefit Retirements	958	283	1,241	77%
TOTAL	5,514	1,403	6,917	80%

Non-Priority Procedures

	Within Target	Over Target	Total	Success Rate
Amalgamation of Records	663	1,085	1,748	38%
Additional Voluntary Contribution Calculations	732	117	849	86%
Deferred Benefit Calculations (including recalculations)	886	531	1,417	63%
Divorce Calculations	326	12	338	96%
Frozen Refunds	999	1,509	2,508	40%
Other Member Estimates	322	378	700	46%
Non-Priority General	12,867	1,558	14,425	89%
Payroll Adjustments	1,714	70	1,784	96%
Police & Fire Retirement Estimates	2	1	3	67%
Refunds	948	119	1,067	89%
Retirement Estimates	1,091	320	1,411	77%
New Starters	139	-	139	100%
Transfer Values In	70	150	220	32%
Transfer Values Out	212	359	571	37%
TOTAL	20,971	6,209	27,180	77%