

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.

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### **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.
- 1.2 Peninsula Pensions also monitors 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.
- 1.3 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 Total performance against internal targets for the quarter ending 30<sup>th</sup> September 2020 was 94%, despite the impact of COVID19, bringing the total performance for the financial year to date to 92%.
- 2.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30<sup>th</sup> September 2020 was 96%.
- 2.3 The team received a total of 38 compliments over the quarter.
- 2.4 Appendix 1 of the report provides a detailed breakdown of administration performance relating to the Devon Pension Fund only for the quarter ending 30<sup>th</sup> September 2020 against Peninsula Pensions' internal targets and against the Disclosure Regulations.
- 2.4. Appendix 2 of the report presents the longer-term performance of Peninsula Pensions (Devon Pension Fund only) from 1st January 2019 to 30<sup>th</sup> September 2020.

### **3. CONCLUSION**

3.1 The Board is asked to note the report.

Mary Davis  
County Treasurer

[Electoral Divisions: All]

**LOCAL GOVERNMENT ACT 1972:  
LIST OF BACKGROUND PAPERS: NIL**  
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## Administration Performance – 01/04/2020 to 30/09/2020 (Devon Pension Fund)

### Performance Summary

|                            | Total Cases   | 01/04/2020 – 30/09/2020 |                         | Q2 2020/21             |                         |
|----------------------------|---------------|-------------------------|-------------------------|------------------------|-------------------------|
|                            |               | Performance (Internal)  | Performance (Disc Regs) | Performance (Internal) | Performance (Disc Regs) |
| High Priority Procedures   | 5,372         | 94%                     | 94%                     | 94%                    | 95%                     |
| Medium Priority Procedures | 13,211        | 91%                     | 94%                     | 94%                    | 96%                     |
| Low Priority Procedures    | 1,951         | 91%                     | 93%                     | 93%                    | 94%                     |
| <b>TOTAL</b>               | <b>20,534</b> | <b>92%</b>              | <b>94%</b>              | <b>94%</b>             | <b>96%</b>              |

### High Priority

|                        | Total Cases  | 01/04/2020 – 30/09/2020 |                         | Q2 2020/21             |                         |
|------------------------|--------------|-------------------------|-------------------------|------------------------|-------------------------|
|                        |              | Performance (Internal)  | Performance (Disc Regs) | Performance (Internal) | Performance (Disc Regs) |
| Changes                | 769          | 99%                     | 99%                     | 99%                    | 99%                     |
| Complaints (Member)    | 39           | 100%                    | 100%                    | 100%                   | 100%                    |
| Complaints (Employer)  | 0            | -                       | -                       | -                      | -                       |
| Deaths                 | 627          | 84%                     | 85%                     | 85%                    | 86%                     |
| Payroll                | 1,669        | 100%                    | 100%                    | 99%                    | 99%                     |
| Refunds                | 326          | 99%                     | 99%                     | 100%                   | 100%                    |
| Retirements (Active)   | 664          | 84%                     | 84%                     | 91%                    | 92%                     |
| Retirements (Deferred) | 1,278        | 90%                     | 91%                     | 91%                    | 91%                     |
| <b>TOTAL</b>           | <b>5,372</b> | <b>94%</b>              | <b>94%</b>              | <b>94%</b>             | <b>95%</b>              |

### Medium Priority

|                      | Total Cases   | 01/04/2020 – 30/09/2020 |                         | Q2 2020/21             |                         |
|----------------------|---------------|-------------------------|-------------------------|------------------------|-------------------------|
|                      |               | Performance (Internal)  | Performance (Disc Regs) | Performance (Internal) | Performance (Disc Regs) |
| Amalgamations        | 1,615         | 81%                     | 92%                     | 91%                    | 98%                     |
| Deferred Benefits    | 2,163         | 80%                     | 82%                     | 88%                    | 90%                     |
| Divorce Calculations | 116           | 78%                     | 78%                     | 89%                    | 89%                     |
| Employer Queries     | 1,078         | 62%                     | 74%                     | 69%                    | 80%                     |
| Estimates (Bulk)     | 0             | -                       | -                       | -                      | -                       |
| Estimates (Employer) | 50            | 100%                    | 100%                    | 100%                   | 100%                    |
| Estimates (Member)   | 285           | 98%                     | 98%                     | 98%                    | 98%                     |
| General              | 5,346         | 100%                    | 100%                    | 100%                   | 100%                    |
| HMRC                 | 35            | 89%                     | 89%                     | 91%                    | 91%                     |
| Member Self-Service  | 2,523         | 100%                    | 100%                    | 100%                   | 100%                    |
| <b>TOTAL</b>         | <b>13,211</b> | <b>91%</b>              | <b>94%</b>              | <b>94%</b>             | <b>96%</b>              |

**Low Priority**

|                                |              | 01/04/2020 – 30/09/2020 |                         | Q2 2020/21             |                         |
|--------------------------------|--------------|-------------------------|-------------------------|------------------------|-------------------------|
|                                | Total Cases  | Performance (Internal)  | Performance (Disc Regs) | Performance (Internal) | Performance (Disc Regs) |
| <b>Estimates (Other)</b>       | 88           | 89%                     | 89%                     | 93%                    | 93%                     |
| <b>GMP Queries</b>             | 0            | -                       | -                       | -                      | -                       |
| <b>Interfund Transfers In</b>  | 229          | 73%                     | 83%                     | 79%                    | 83%                     |
| <b>Interfund Transfers Out</b> | 152          | 76%                     | 85%                     | 68%                    | 79%                     |
| <b>Pension Top Ups</b>         | 134          | 93%                     | 93%                     | 98%                    | 98%                     |
| <b>Frozen Refunds</b>          | 975          | 99%                     | 99%                     | 99%                    | 99%                     |
| <b>New Starters</b>            | 1            | 100%                    | 100%                    | -                      | -                       |
| <b>Pension Transfers In</b>    | 143          | 94%                     | 96%                     | 98%                    | 98%                     |
| <b>Pension Transfers Out</b>   | 229          | 79%                     | 79%                     | 91%                    | 91%                     |
| <b>TOTAL</b>                   | <b>1,951</b> | <b>91%</b>              | <b>93%</b>              | <b>93%</b>             | <b>94%</b>              |

# Administration Performance – 01/01/2019 to 30/09/2020 (Devon Pension Fund)

