

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 30th June 2021 was 86%. During this period the team successfully completed 91% of High Priority procedures within timescale.
- 2.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30th June 2021 was also 87%.
- 2.3 The main reason for the slight drop in performance in 2.1 and 2.2 relates to employer response times in respect of employer queries. We are working closely with employers to implement improvements in this area and will provide an update on this in the next performance report.
- 2.4 The team received a total of 35 compliments between 1<sup>st</sup> April 2021 and 31<sup>st</sup> 30<sup>th</sup> June 2021.
- 2.5 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> June 2021 against Peninsula Pensions' internal targets and against the Disclosure Regulations.

2.6 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> June 2021.

### 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 – 01/04/2021 to 30/06/2021 (Devon Pension Fund)

### Performance Summary

|                            | Total Cases  | Q1 2021/22             |                         |
|----------------------------|--------------|------------------------|-------------------------|
|                            |              | Performance (Internal) | Performance (Disc Regs) |
| High Priority Procedures   | 3,259        | 91%                    | 92%                     |
| Medium Priority Procedures | 4,827        | 81%                    | 84%                     |
| Low Priority Procedures    | 1,040        | 92%                    | 92%                     |
| <b>TOTAL</b>               | <b>9,126</b> | <b>86%</b>             | <b>87%</b>              |

### High Priority Cases

|                        | Total Cases  | Q1 2021/22             |                         |
|------------------------|--------------|------------------------|-------------------------|
|                        |              | Performance (Internal) | Performance (Disc Regs) |
| Changes                | 403          | 100%                   | 100%                    |
| Complaints (Member)    | 29           | 100%                   | 100%                    |
| Complaints (Employer)  | 0            | -                      | -                       |
| Deaths                 | 324          | 87%                    | 87%                     |
| Deferred (over 55)     | 291          | 87%                    | 87%                     |
| Payroll                | 907          | 100%                   | 100%                    |
| Refunds                | 156          | 100%                   | 100%                    |
| Retirements (Active)   | 439          | 89%                    | 90%                     |
| Retirements (Deferred) | 710          | 79%                    | 79%                     |
| <b>TOTAL</b>           | <b>3,259</b> | <b>91%</b>             | <b>92%</b>              |

### Medium Priority Cases

|                               | Total Cases  | Q1 2021/22             |                         |
|-------------------------------|--------------|------------------------|-------------------------|
|                               |              | Performance (Internal) | Performance (Disc Regs) |
| Amalgamation of Records       | 786          | 73%                    | 74%                     |
| Deferred Benefit Calculations | 1,271        | 86%                    | 86%                     |
| Divorce Calculations          | 82           | 85%                    | 85%                     |
| Employer Queries              | 855          | 46%                    | 57%                     |
| Estimates (Bulk)              | 0            | -                      | -                       |
| Estimates (Employer)          | 38           | 95%                    | 95%                     |
| Estimates (Member)            | 78           | 85%                    | 85%                     |
| General                       | 738          | 98%                    | 98%                     |
| HMRC                          | 6            | 100%                   | 100%                    |
| Member Self-Service           | 973          | 100%                   | 100%                    |
| <b>TOTAL</b>                  | <b>4,827</b> | <b>81%</b>             | <b>84%</b>              |

Low Priority Cases

|                         | Total Cases  | Q1 2021/22             |                         |
|-------------------------|--------------|------------------------|-------------------------|
|                         |              | Performance (Internal) | Performance (Disc Regs) |
| Estimates (Other)       | 36           | 78%                    | 81%                     |
| GMP Queries             | 2            | 100%                   | 100%                    |
| Interfund Transfers In  | 107          | 72%                    | 76%                     |
| Interfund Transfers Out | 72           | 83%                    | 83%                     |
| Pension Top Ups         | 39           | 92%                    | 92%                     |
| Frozen Refunds          | 671          | 98%                    | 98%                     |
| New Starters            | 0            | -                      | -                       |
| Pension Transfers In    | 58           | 83%                    | 83%                     |
| Pension Transfers Out   | 55           | 84%                    | 84%                     |
| <b>TOTAL</b>            | <b>1,040</b> | <b>92%</b>             | <b>92%</b>              |

**Administration Performance – 01/01/2019 to 31/06/2021 (Devon Pension Fund)**

