

PENINSULA PENSIONS ADMINISTRATION PERFORMANCE STATISTICS

Report of the County Treasurer

Please note that the following recommendation is subject to consideration and determination by the Board before taking effect.
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Recommendation: that the Board notes the report and actions being undertaken by officers to ensure compliance and best practice.

1. Introduction

- 1.1. At the pension board meeting held on 22nd October 2015, a request for a detailed pension administration report was noted.
- 1.2. Appendix 1 details the position as at September 2015 and 29th February 2016 for both work completed in target and numbers of outstanding cases.
- 1.3. Our main service standard is to complete 90% of work within 10 working days from when all necessary information has been received. This is monitored every month through our task management system (TMS) which is an in-house workflow within our pension database.
- 1.4. 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. In 2014/15 the team issued 88% of work within target though backlogs of work in some areas were building up. The performance target for 2015/16 is to improve on last year's performance and see a reduction in the backlogs.
- 2.2. Overall performance to date for 2015/16 is currently 70% of work within target. Some areas of work are ahead of performance targets whilst others remain below.
- 2.3. Additional resources were agreed and a small team was established in October to clear the backlog of deferred benefit calculations. The backlog was cleared by the end of February which is a positive though the clearing of such a large backlog will ultimately result in the overall percentage achieved within target.

3. Conclusion

- 3.1. It has been agreed that the additional team will be extended until Autumn 2016 to enable the backlog of amalgamations to be targeted. The backlog of amalgamation cases has built up due to a delay in the LGPS regulations and processing of the deferred leavers.
- 3.2. New Preserved benefit cases and amalgamations will revert back to the main benefit teams from April.

3.3. The new way of working started last September has been reviewed and changes made in January 2016 which has shown an improvement in performance and staff moral.

4. Conclusion

4.1. Although the percentage in target has reduced the most important thing was to reduce the backlogs, in turn improving the customer experience. We will need to closely monitor that the work returning to the main benefit teams does not slip. However this is a positive end to a challenging year.

Mary Davis

Electoral Divisions: All

Local Government Act 1972

List of Background Papers - Nil

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