# 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.

# 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 <u>Local Government Act 1972</u> <u>List of Background Papers - Nil</u> Contact for Enquiries: Shirley Cuthbert Tel No: (01392) 383000 Great Moor House

# Appendix 1

\* overall % in target achieved in 2014/15

\*\* Number of cases processed

COMPLETED		Sep-15		Feb-16	
Priority Procedures (84%)*	765**	76%	918	3 70%	
Non-Priority Procedures (90%)	3710	82%	4049	73%	
Combined (88%)	3710	81%	4967	7 72%	
Priority					
, Death in Service/pensioner (65%)	88	72%	120	58%	
Employer retirement estimates (91%)	44	86%	100	94%	
Prority General enquiry (	366	95%	399	85%	
Retirement from active (58%)	264	50%	188	3 35%	
Retirement from deferred	179	36%	111	L 65%	
Non-Priority					
Amalgmations	36	69%	42	2 71%	
Additioanl Voluntary Contributions (73%)	213	69%	123	8 89%	
Deferred leavers (80%)	519	57%	937	7 59%	
Divorce (90%)	43	100%	31	l 100%	
Frozen refunds (65%)	110	46%	409	72%	
Non Prority enquires (98%)	1799	98%	1418	8 83%	
Payroll (99%)	267	98%	325	5 100%	
Refunds (73%)	42	88%	106	5 93%	
Employee estimates (73%)	254	73%	314	l 67%	
Starters (89%)	80	96%	42	98%	
Transfers in (50%)	111	53%	188	3 21%	
Transfers Out (77%)	57	79%	114	42%	

#### OUTSTANDING TASKS

#### Priority

Death
Employer Est
Priority General
Retirements

#### Non Priority

Amalgamations AVC Deferred Inc Recalcs Divorce Frozen NP General Payroll Refunds Ret estimates Starters TV In TV Out

Total	Net	Total >10
Outstanding	Outstanding	days old
334	91	1
34	21	
190	85	31
760	355	63
1989	1433	1246
160	47	31
11223	9585	8887
42	12	
593	390	281
521	331	97
156	77	
114	46	24
498	294	99
26	6	6
897	539	363
304	193	123
17841	13505	11252

Total	Net	Total >10
Outstanding	Outstanding	days old
322	67	0
31	26	0
181	86	54
648	286	19
6715	6087	5849
163	62	34
1698	431	44
45	18	0
655	284	99
183	107	10
95	37	0
408	201	43
162	109	32
18	0	0
651	306	90
325	173	78
12300	8280	6352