

## Review of Administration Performance

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*Executive Portfolio Holder:* Not applicable

*Division and Local* Not applicable

*Member:*

### 1. Background

- 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 In addition to the internal targets, 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. This additional reporting element was introduced from 1<sup>st</sup> January 2019.
- 1.3 Performance targets are monitored on a monthly basis via a task management system and reporting tool within the pension database.
- 1.4 This report also encompasses an update on employer bodies covered by the Fund.

### 2. Issues for consideration

- 2.1 The Committee note the report and actions being undertaken by officers to ensure compliance and best practice.

### 3. Administration team performance

- 3.1 At the previous meeting of the Committee, we reported that the administration performance for quarter ending 30<sup>th</sup> September 2019 against internal targets was 86% (compared with 76% for 2017/18 and 82% for 2018/19).
- 3.2 Performance for the most recent quarter, ending 31<sup>st</sup> December 2019, has improved to 89% against our internal targets, bringing the total performance for the financial year to date to 88%.

- 3.3 Following a change to reporting methods, we are now able to monitor our performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013. Our performance against the Disclosure Regulations for the financial year to date remains consistent at 94%.
- 3.5 Appendix 1 of the report shows a detailed breakdown of administration performance relating to the Somerset Pension Fund only for the quarter ending 31<sup>st</sup> December 2019 and for the financial year to date against Peninsula Pensions' internal targets and against the Disclosure Regulations.
- 3.6 Appendix 2 of the report highlights the longer-term performance of Peninsula Pensions (Somerset Fund only) from 1<sup>st</sup> January 2018 to 31<sup>st</sup> December 2019.

#### **4. Employer updates**

##### 4.1 New Admitted Bodies:

- Pabulum Catering was awarded the catering contract for the Priory Learning Trust with effect from 1<sup>st</sup> January 2020.
- Suez was awarded the contract for waste collection for the Somerset Waste Partnership commencing 1<sup>st</sup> April 2020

##### Academies:

- Maiden Beech Academy joined the Bridgwater and Taunton College Trust on 1<sup>st</sup> December 2019.
- Cheddar First School will join the Wessex Learning Trust on 1<sup>st</sup> April 2020.

#### **5. Background Papers**

##### 5.1 None

## Appendix 1

### Administration Performance – 1<sup>st</sup> September 2019 to 31<sup>st</sup> December 2019

#### Performance Summary

	Total Cases	Q3 2019		Year to date	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	6,146	93%	95%	88%	91%
Medium Priority Procedures	7,711	86%	94%	89%	96%
Low Priority Procedures	2,171	88%	94%	81%	93%
<b>TOTAL</b>	<b>16,028</b>	<b>89%</b>	<b>94%</b>	<b>88%</b>	<b>94%</b>

#### High Priority Cases

	Total Cases	Q3 2019		Year to date	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Changes	1,693	99%	100%	99%	100%
Complaints (Member)	20	100%	100%	100%	100%
Complaints (Employer)	-	-	-	-	-
Deaths	482	87%	91%	71%	82%
Payroll	1,256	99%	100%	98%	99%
Refunds	410	100%	100%	100%	100%
Retirements (Active)	1,024	83%	84%	64%	72%
Retirements (Deferred)	1,261	90%	93%	84%	86%
<b>TOTAL</b>	<b>6,146</b>	<b>93%</b>	<b>95%</b>	<b>88%</b>	<b>91%</b>

#### Medium Priority Cases

	Total Cases	Q3 2019		Year to date	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Amalgamation of Records	1,201	64%	93%	68%	94%
Deferred Benefit Calculations	1,414	82%	86%	85%	90%
Divorce Calculations	142	98%	98%	97%	97%
Employer Queries	1,408	89%	95%	84%	97%
Estimates (Bulk)	-	-	-	-	-
Estimates (Employer)	123	100%	100%	100%	100%
Estimates (Member)	388	97%	97%	97%	97%
General	981	99%	99%	99%	100%
HMRC	38	94%	99%	87%	95%
Member Self-Service	2,016	100%	100%	100%	100%
<b>TOTAL</b>	<b>7,711</b>	<b>86%</b>	<b>94%</b>	<b>89%</b>	<b>96%</b>

**Low Priority Cases**

	Total Cases	Q3 2019		Year to date	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	94	77%	81%	74%	80%
GMP Queries	10	100%	100%	100%	100%
Interfund Transfers In	133	39%	80%	35%	87%
Interfund Transfers Out	187	43%	82%	35%	86%
Pension Top Ups	297	98%	98%	96%	97%
Frozen Refunds	866	98%	98%	95%	95%
New Starters	21	100%	100%	100%	100%
Pension Transfers In	348	87%	92%	72%	94%
Pension Transfers Out	215	88%	90%	86%	93%
<b>TOTAL</b>	<b>2,171</b>	<b>88%</b>	<b>94%</b>	<b>81%</b>	<b>93%</b>

Administration Performance (Jan 2018 – December 2019)

