

## **Review of Administration Performance**

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<i>Executive Portfolio Holder:</i>	Not applicable
<i>Division and Local Member:</i>	Not applicable

### **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 in 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 Performance against internal targets for the quarter ending 31<sup>st</sup> March 2020 remained consistent at 89%, bringing the total performance for the financial year 2019/20 to 88% (compared with 76% for 2017/18 and 82% for 2018/19).

- 3.2 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 total performance against the Disclosure Regulations for the financial year 2019/20 was 93%.
- 3.3 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> March 2020 and total performance for the financial year 2019/20 against Peninsula Pensions' internal targets and against the Disclosure Regulations.
- 3.4 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> March 2020.

#### **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 joined the Wessex Learning Trust on 1<sup>st</sup> April 2020.
- Shipham Church of England First School, Fairlands Middle School and Draycott & Rodney Stoke Church of England First School joined the Wessex Learning Trust on 1<sup>st</sup> April 2020.
- St Mary & St Peter Church of England Primary School and Shepton Beauchamp Church of England Primary School joined the Bath and Wells Multi Academy Trust on 1<sup>st</sup> April 2020.

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

##### 5.1 None

## Appendix 1

### Administration Performance – 1<sup>st</sup> April 2019 – 31<sup>st</sup> March 2020

#### Performance Summary

	Total Cases	Q4 2019/20		Total for 2019/20	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	7,855	92%	93%	89%	91%
Medium Priority Procedures	10,964	88%	93%	89%	95%
Low Priority Procedures	2,976	87%	91%	83%	93%
<b>TOTAL</b>	<b>21,795</b>	<b>89%</b>	<b>93%</b>	<b>88%</b>	<b>93%</b>

#### High Priority Cases

	Total Cases	Q4 2019/20		Total for 2019/20	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Changes	2,085	99%	99%	99%	100%
Complaints (Member)	21	100%	100%	100%	100%
Complaints (Employer)	0	-	-	-	-
Deaths	650	94%	94%	77%	85%
Payroll	1,667	99%	99%	98%	99%
Refunds	494	100%	100%	100%	100%
Retirements (Active)	1,291	75%	76%	67%	73%
Retirements (Deferred)	1,647	87%	87%	85%	86%
<b>TOTAL</b>	<b>7,855</b>	<b>92%</b>	<b>93%</b>	<b>89%</b>	<b>91%</b>

#### Medium Priority Cases

	Total Cases	Q4 2019/20		Total for 2019/20	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Amalgamation of Records	1,668	69%	92%	68%	93%
Deferred Benefit Calculations	1,926	65%	68%	79%	85%
Divorce Calculations	180	97%	97%	97%	97%
Employer Queries	1,559	56%	89%	82%	96%
Estimates (Bulk)	0	0%	-	-	-
Estimates (Employer)	158	100%	100%	100%	100%
Estimates (Member)	522	96%	96%	97%	97%
General	1,368	99%	100%	99%	100%
HMRC	42	100%	0%	88%	86%
Member Self-Service	3,541	100%	100%	100%	100%
<b>TOTAL</b>	<b>10,964</b>	<b>88%</b>	<b>93%</b>	<b>89%</b>	<b>95%</b>

**Low Priority Cases**

	Total Cases	Q4 2019/20		Total for 2019/20	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	145	73%	73%	74%	77%
GMP Queries	11	100%	100%	100%	100%
Interfund Transfers In	195	61%	77%	44%	84%
Interfund Transfers Out	293	64%	83%	46%	85%
Pension Top Ups	386	96%	96%	96%	97%
Frozen Refunds	1,215	96%	96%	96%	96%
New Starters	22	100%	100%	100%	100%
Pension Transfers In	411	94%	98%	76%	95%
Pension Transfers Out	298	89%	90%	87%	93%
<b>TOTAL</b>	<b>2,976</b>	<b>87%</b>	<b>91%</b>	<b>83%</b>	<b>93%</b>

Administration Performance (1<sup>st</sup> Jan 2018 – 31<sup>st</sup> March 2019)

