

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.
- 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 Total performance against internal targets for the quarter ending 30th June 2020 was 87%, despite the impact of COVID19 (including increased demand). However, during this period we were able to maintain performance for High Priority procedures at 95%.
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30th June 2020 was 91%, despite the impact of COVID19.
- 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 30th June 2020 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 1st January 2019 to 30th June 2020.

4. Employer updates

4.1 New Admitted Bodies:

- None to report

Academies:

- None to report

5. Background Papers

5.1 None

Administration Performance – 1st April 2020 – 30th June 2020Performance Summary

	Total Cases	Q1 2020/21	
		Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	1,548	95%	95%
Medium Priority Procedures	3,587	84%	89%
Low Priority Procedures	770	88%	91%
TOTAL	5,905	87%	91%

High Priority Cases

	Total Cases	Q1 2020/21	
		Performance (Internal)	Performance (Disc Regs)
Changes	315	99%	100%
Complaints (Member)	4	100%	100%
Complaints (Employer)	0	-	-
Deaths	195	90%	90%
Payroll	425	100%	100%
Refunds	103	99%	99%
Retirements (Active)	176	90%	90%
Retirements (Deferred)	330	90%	90%
TOTAL	1,548	95%	95%

Medium Priority Cases

	Total Cases	Q1 2020/21	
		Performance (Internal)	Performance (Disc Regs)
Amalgamation of Records	642	76%	89%
Deferred Benefit Calculations	787	60%	63%
Divorce Calculations	41	63%	63%
Employer Queries	124	41%	81%
Estimates (Bulk)	0	-	-
Estimates (Employer)	7	100%	100%
Estimates (Member)	70	99%	99%
General	923	99%	99%
HMRC	2	50%	50%
Member Self-Service	991	100%	100%
TOTAL	3,587	84%	89%

Low Priority Cases

	Total Cases	Q1 2020/21	
		Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	50	100%	100%
GMP Queries	3	100%	100%
Interfund Transfers In	83	64%	80%
Interfund Transfers Out	111	76%	85%
Pension Top Ups	51	100%	100%
Frozen Refunds	305	96%	96%
New Starters	0	-	-
Pension Transfers In	53	98%	98%
Pension Transfers Out	114	81%	81%
TOTAL	770	88%	91%

Administration Performance (1st Jan 2019 – 30th June 2020)

