

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 September 2020 was 91% (compared with 87% for the previous quarter), despite the continued impact of COVID19. The team were also able to maintain performance for High Priority procedures at 96% (compared with 95% for the previous quarter).
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30th

September 2020 was 93% (96% for High Priority procedures).

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 September 2020 and for the financial year to date 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 September 2020.

4. Employer updates

4.1 New Admitted Bodies:

- Glenn Cleaning was awarded the cleaning contract for The Castle Partnership Trust with effect from 1st August 2020, under a closed agreement.

Academies:

- Isambard Kingdom Brunel Primary School joined The Castle Partnership Trust on 1st September 2020

5. Background Papers

5.1 None

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

	Total Cases	01/04/2020 – 30/09/2020		Q2 2020/21	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	2,936	95%	96%	96%	96%
Medium Priority Procedures	6,899	87%	90%	90%	92%
Low Priority Procedures	1,373	88%	91%	88%	92%
TOTAL	11,208	89%	92%	91%	93%

High Priority Cases

	Total Cases	01/04/2020 – 30/09/2020		Q2 2020/21	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Changes	469	99%	100%	100%	100%
Complaints (Member)	19	100%	100%	100%	100%
Complaints (Employer)	0	-	-	-	-
Deaths	353	93%	93%	97%	97%
Payroll	878	99%	99%	99%	99%
Refunds	184	99%	99%	100%	100%
Retirements (Active)	331	85%	86%	81%	81%
Retirements (Deferred)	702	92%	92%	95%	95%
TOTAL	2,936	95%	96%	96%	96%

Medium Priority Cases

	Total Cases	01/04/2020 – 30/09/2020		Q2 2020/21	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Amalgamations	1,033	81%	91%	89%	95%
Deferred Benefits	1,414	62%	65%	66%	67%
Divorce Calculations	86	83%	83%	100%	100%
Employer Queries	310	52%	82%	59%	83%
Estimates (Bulk)	0	-	-	-	-
Estimates (Employer)	22	100%	100%	100%	100%
Estimates (Member)	143	98%	98%	97%	97%
General	2,507	100%	100%	100%	100%
HMRC	19	89%	89%	94%	94%
Member Self-Service	1,365	100%	100%	100%	100%
TOTAL	6,899	87%	90%	90%	92%

Low Priority Cases

	Total Cases	01/04/2020 – 30/09/2020		Q2 2020/21	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	77	99%	99%	96%	96%
GMP Queries	6	100%	100%	100%	100%
Interfund Transfers In	168	65%	80%	67%	81%
Interfund Transfers Out	195	71%	80%	64%	74%
Pension Top Ups	86	97%	97%	91%	91%
Frozen Refunds	568	97%	97%	98%	98%
New Starters	0	-	-	-	-
Pension Transfers In	101	97%	97%	96%	96%
Pension Transfers Out	172	86%	86%	97%	97%
TOTAL	1,373	88%	91%	88%	92%

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

