

## 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.
- 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 30<sup>th</sup> September 2021 was 89% (95% for High Priority procedures), bringing the total performance for the financial year to date to 90%.
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30<sup>th</sup> September 2021 was also 89% (95% 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 30<sup>th</sup> September 2021 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 1<sup>st</sup> January 2019 to 30<sup>th</sup> September 2021.

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

4.1 New Admitted Bodies:

- Oakfield Academy Trust outsourced their catering to Clever Chefs Ltd on 1st September 2021 for both Oakfield Academy and Selwood Academy under a closed agreement.
- Bishop Fox's School outsourced their cleaning to Direct Cleaning Services on 1st September 2021 under a closed agreement.
- Huish Episcopi Academy outsourced the management and operations of Huish Leisure Centre to Lifestyle Fitness Group Ltd under a closed agreement.

Academies:

- Park Road Autism Base joined Midsomer Norton Schools Partnership on 1st March 2021 (late notification)
- Bucklers Mead Academy joined Midsomer Norton Schools Partnership on 1st September 2021

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

5.1 None

**Administration Performance – 1<sup>st</sup> April 2021 – 30<sup>th</sup> September 2021**

**Performance Summary**

	Total Cases	01/04/2021 – 30/09/2021		Q2 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	3,476	95%	95%	95%	95%
Medium Priority Procedures	4,173	87%	87%	85%	85%
Low Priority Procedures	1,303	84%	84%	83%	83%
<b>TOTAL</b>	<b>8,952</b>	<b>90%</b>	<b>90%</b>	<b>89%</b>	<b>89%</b>

**High Priority**

	Total Cases	01/04/2021 – 30/09/2021		Q2 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Changes	378	99%	99%	100%	100%
Complaints (Member)	34	100%	100%	100%	100%
Complaints (Employer)	0	-	-	-	-
Deaths	310	92%	92%	95%	95%
Payroll	336	97%	97%	98%	98%
Refunds	898	100%	100%	100%	100%
Deferred (Over 55)	165	100%	100%	100%	100%
Retirements (Active)	492	96%	96%	97%	97%
Retirements (Deferred)	863	87%	87%	87%	87%
<b>TOTAL</b>	<b>3,476</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>

**Medium Priority**

	Total Cases	01/04/2021 – 30/09/2021		Q2 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Amalgamations	589	70%	71%	66%	68%
Deferred Benefits	1,111	76%	77%	72%	72%
Divorce Calculations	102	84%	84%	97%	97%
Employer Queries	278	80%	82%	63%	64%
Estimates (Bulk)	0	-	-	-	-
Estimates (Employer)	29	100%	100%	100%	100%
Estimates (Member)	116	89%	89%	88%	88%
General	982	98%	98%	98%	98%
HMRC	22	100%	100%	100%	100%
Member Self-Service	944	100%	100%	100%	100%
<b>TOTAL</b>	<b>4,173</b>	<b>87%</b>	<b>87%</b>	<b>85%</b>	<b>85%</b>

**Low Priority**

	Total Cases	01/04/2021 – 30/09/2021		Q2 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	107	44%	44%	37%	37%
GMP Queries	2	100%	100%	100%	100%
Interfund Transfers In	136	52%	53%	50%	50%
Interfund Transfers Out	103	69%	70%	62%	62%
Pension Top Ups	140	96%	96%	94%	94%
Frozen Refunds	551	98%	98%	99%	99%
New Starters	0	-	-	-	-
Pension Transfers In	128	92%	92%	93%	93%
Pension Transfers Out	136	85%	85%	86%	86%
<b>TOTAL</b>	<b>1,303</b>	<b>84%</b>	<b>84%</b>	<b>83%</b>	<b>83%</b>

Administration Performance - 1<sup>st</sup> January 2019 - 30<sup>th</sup> June 2021

