

Review of Administration Performance

<i>Lead Officer:</i>	Jason Vaughan: Director of Finance
<i>Author:</i>	Dan Harris: Head of Peninsula Pensions
<i>Contact Details:</i>	(01392) 383000 daniel.harris@devon.gov.uk
<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 31st December 2021 was 88% (96% for High Priority procedures), bringing the total performance for the financial year to date to 89%.
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 31st December 2021 was also 88% (97% 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 31st December 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 1st January 2019 to 31st December 2021.

4. Employer updates

4.1 New Admitted Bodies:

- Hindhayes School outsourced their cleaning contract to Premier Solutions Ltd with effect from 15th November 2021.

Academies:

- Sexeys School joined Quantock Education Trust on 1st October 2021

5. Background Papers

5.1 None

Administration Performance – 1st April 2021 – 31st December 2021Performance Summary

	Total Cases	01/04/2021 – 31/12/2021		Q3 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	5,039	95%	95%	96%	97%
Medium Priority Procedures	6,382	85%	85%	81%	81%
Low Priority Procedures	2,154	86%	86%	89%	89%
TOTAL	13,575	89%	89%	88%	88%

High Priority

	Total Cases	01/04/2021 – 31/12/2021		Q3 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Changes	564	99%	100%	100%	100%
Complaints (Member)	40	100%	100%	100%	100%
Complaints (Employer)	0			-	-
Deaths	501	93%	94%	95%	96%
Payroll	545	97%	97%	98%	98%
Refunds	1,182	100%	100%	99%	99%
Deferred (Over 55)	265	100%	100%	100%	100%
Retirements (Active)	741	96%	96%	98%	98%
Retirements (Deferred)	1,201	88%	88%	90%	90%
TOTAL	5,039	95%	95%	96%	97%

Medium Priority

	Total Cases	01/04/2021 – 31/12/2021		Q3 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Amalgamations	996	67%	68%	62%	63%
Deferred Benefits	1,819	73%	73%	67%	68%
Divorce Calculations	136	88%	88%	100%	100%
Employer Queries	353	73%	75%	48%	52%
Estimates (Bulk)	0	-	-	-	-
Estimates (Employer)	50	100%	100%	100%	100%
Estimates (Member)	145	90%	90%	93%	93%
General	1,427	98%	98%	99%	99%
HMRC	65	100%	100%	100%	100%
Member Self-Service	1,391	100%	100%	100%	100%
TOTAL	6,382	85%	85%	81%	81%

Low Priority

	Total Cases	01/04/2021 – 31/12/2021		Q3 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	145	39%	39%	26%	26%
GMP Queries	2	100%	100%	-	-
Interfund Transfers In	198	53%	54%	53%	55%
Interfund Transfers Out	170	71%	72%	75%	76%
Pension Top Ups	212	97%	97%	99%	99%
Frozen Refunds	1,041	98%	98%	99%	99%
New Starters	0	-	-	-	-
Pension Transfers In	186	92%	92%	91%	91%
Pension Transfers Out	200	87%	87%	92%	92%
TOTAL	2,154	86%	86%	89%	89%

Administration Performance - 1st January 2019 – 31st December 2021

