

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 2022 was 87% (96% for High Priority procedures).
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30th June 2022 was also 87% (96% for High Priority procedures).
- 3.3 During the quarter, the team received 21 compliments.
- 3.4 Appendix 1 of the report provides a detailed breakdown of administration performance relating to the Somerset Pension Fund only for the quarter

ending 30th June 2022 against Peninsula Pensions' internal targets and against the Disclosure Regulations.

3.5 Appendix 2 of the report highlights the longer-term performance of Peninsula Pensions (Somerset Fund only) from 1st January 2020 to 30th June 2022.

4. Employer updates

4.1 New Admitted Bodies:

- None

Academies:

- None

5. Background Papers

5.1 None

Administration Performance – 1st April 2022 – 30th June 2022

Performance Summary

	Total Cases	Q1 2022/23	
		Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	2,037	96%	96%
Medium Priority Procedures	2,554	80%	81%
Low Priority Procedures	856	84%	84%
TOTAL	5,447	87%	87%

High Priority Cases

	Total Cases	Q1 2022/23	
		Performance (Internal)	Performance (Disc Regs)
Changes	563	100%	100%
Complaints (Member)	16	100%	100%
Complaints (Employer)	1	100%	100%
Deaths	131	89%	89%
Deferred (over 55)	169	88%	88%
Payroll	414	99%	99%
Refunds	109	100%	100%
Retirements (Active)	224	95%	95%
Retirements (Deferred)	410	91%	91%
TOTAL	2,037	96%	96%

Medium Priority Cases

	Total Cases	Q1 2022/23	
		Performance (Internal)	Performance (Disc Regs)
Amalgamation of Records	373	71%	72%
Deferred Benefit Calculations	922	62%	62%
Divorce Calculations	56	95%	95%
Employer Queries	172	80%	84%
Estimates (Bulk)	0	-	-
Estimates (Employer)	2	100%	100%
Estimates (Member)	41	95%	95%
General	302	99%	99%
HMRC	6	100%	100%
Member Self-Service	680	100%	100%
TOTAL	2,554	80%	81%

Low Priority Cases

	Total Cases	Q1 2022/23	
		Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	65	55%	55%
GMP Queries	2	-	100%
Interfund Transfers In	105	55%	55%
Interfund Transfers Out	95	86%	86%
Pension Top Ups	39	95%	95%
Frozen Refunds	416	95%	95%
New Starters	0	-	-
Pension Transfers In	94	87%	87%
Pension Transfers Out	40	70%	70%
TOTAL	856	84%	84%

Administration Performance - 1st January 2020 – 30th June 2022

