

## **Review of Administration Performance**

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<i>Cabinet Member:</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 30<sup>th</sup> June 2021 was 90% (94% for High Priority procedures), despite the continued impact of COVID19.
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30<sup>th</sup> June 2021 was 91% (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> June 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> June 2021.

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

4.1 New Admitted Bodies:

- None to report

Academies:

- West Huntspill and East Huntspill Primary Schools joined The Priory Learning Trust on 1<sup>st</sup> April 2021.
- Sky College joined Learn@MAT and became part of the Avon Pension Fund following consultation and agreement of Secretary of State on 1<sup>st</sup> April 2021

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

5.1 None

Administration Performance – 1<sup>st</sup> April 2021 – 30<sup>th</sup> June 2021Performance Summary

	Total Cases	01/04/2021 – 30/06/2021	
		Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	1,765	94%	95%
Medium Priority Procedures	2,279	88%	89%
Low Priority Procedures	687	85%	85%
<b>TOTAL</b>	<b>4,731</b>	<b>90%</b>	<b>91%</b>

High Priority

	Total Cases	01/04/2021 – 30/06/2021	
		Performance (Internal)	Performance (Disc Regs)
Changes	163	98%	99%
Complaints (Member)	17	100%	100%
Complaints (Employer)	0	-	-
Deaths	145	90%	90%
Payroll	168	96%	96%
Deferred (over 55)	484	100%	100%
Refunds	97	100%	100%
Retirements (Active)	240	94%	94%
Retirements (Deferred)	451	87%	87%
<b>TOTAL</b>	<b>1,765</b>	<b>94%</b>	<b>95%</b>

### Medium Priority

	01/04/2021 – 30/06/2021		
	Total Cases	Performance (Internal)	Performance (Disc Regs)
Amalgamations	363	72%	73%
Deferred Benefits	565	80%	81%
Divorce Calculations	66	77%	77%
Employer Queries	189	88%	90%
Estimates (Bulk)	0	-	-
Estimates (Employer)	23	100%	100%
Estimates (Member)	57	89%	89%
General	531	98%	98%
HMRC	4	100%	100%
Member Self-Service	481	100%	100%
<b>TOTAL</b>	<b>2,279</b>	<b>88%</b>	<b>89%</b>

### Low Priority

	01/04/2021 – 30/06/2021		
	Total Cases	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	40	55%	55%
GMP Queries	0	-	-
Interfund Transfers In	74	54%	55%
Interfund Transfers Out	77	71%	73%
Pension Top Ups	70	97%	97%
Frozen Refunds	291	97%	97%
New Starters	0	-	-
Pension Transfers In	55	91%	91%
Pension Transfers Out	80	84%	84%
<b>TOTAL</b>	<b>687</b>	<b>85%</b>	<b>85%</b>

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

