

## 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 31<sup>st</sup> March 2022 was 86% (96% for High Priority procedures), bringing the total performance for the financial year 2021/22 to 88%.
- 3.2 Total performance against the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 31<sup>st</sup> March 2022 was also 86% (96% for High Priority procedures).
- 3.3 During the quarter, the team received 16 compliments, bringing the total

received for the year to 131.

- 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 31<sup>st</sup> March 2022 and for the financial year 2021/22 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 1<sup>st</sup> January 2019 to 31<sup>st</sup> March 2022.

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

##### 4.1 New Admitted Bodies:

- Aspens commenced a catering contract for Bridgwater Schools Academy Trust with effect from 1<sup>st</sup> August 2021 (late notification)

##### Academies:

- Preston School Academy joined the Midsomer Norton Schools Partnership on 1st February 2022.
- The following schools converted to academies and joined the Dunstan Catholic Educational Trust on 1<sup>st</sup> March 2022:
  - St Gildas Catholic Primary School, Yeovil
  - Our Lady of Mount Carmel Catholic Primary School, Wincanton
  - St Joseph and St Teresa Catholic Primary School, Wells
  - St Joseph's Catholic Primary & Nursery School, Burnham-on-Sea
  - St Joseph's Catholic Primary School, Bridgwater.

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

##### 5.1 None

## Administration Performance – 1<sup>st</sup> April 2021 – 31<sup>st</sup> March 2022

### Performance Summary

	Total Cases	01/04/2021 – 31/03/2022		Q4 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
High Priority Procedures	6,817	96%	96%	96%	96%
Medium Priority Procedures	9,358	83%	84%	80%	80%
Low Priority Procedures	2,961	86%	86%	85%	85%
<b>TOTAL</b>	<b>19,136</b>	<b>88%</b>	<b>88%</b>	<b>86%</b>	<b>86%</b>

### High Priority

	Total Cases	01/04/2021 – 31/03/2022		Q4 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Changes	886	100%	100%	100%	100%
Complaints (Member)	52	100%	100%	100%	100%
Complaints (Employer)	0	-	-	-	-
Deaths	690	93%	94%	94%	94%
Payroll	674	96%	96%	91%	91%
Refunds	1,542	100%	100%	100%	100%
Deferred (Over 55)	436	100%	100%	100%	100%
Retirements (Active)	932	96%	96%	93%	93%
Retirements (Deferred)	1,605	89%	89%	93%	93%
<b>TOTAL</b>	<b>6,817</b>	<b>96%</b>	<b>96%</b>	<b>96%</b>	<b>96%</b>

**Medium Priority**

	Total Cases	01/04/2021 – 31/03/2022		Q4 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Amalgamations	1,410	69%	71%	75%	78%
Deferred Benefits	2,700	64%	65%	46%	47%
Divorce Calculations	177	89%	89%	93%	93%
Employer Queries	417	71%	74%	61%	66%
Estimates (Bulk)	0	-	-	-	-
Estimates (Employer)	52	100%	100%	100%	100%
Estimates (Member)	174	91%	91%	100%	100%
General	1,710	98%	98%	98%	98%
HMRC	72	100%	100%	100%	100%
Member Self-Service	2,646	100%	100%	100%	100%
<b>TOTAL</b>	<b>9,358</b>	<b>83%</b>	<b>84%</b>	<b>80%</b>	<b>80%</b>

**Low Priority**

	Total Cases	01/04/2021 – 31/03/2022		Q4 2021/22	
		Performance (Internal)	Performance (Disc Regs)	Performance (Internal)	Performance (Disc Regs)
Estimates (Other)	170	41%	41%	52%	52%
GMP Queries	4	100%	100%	100%	100%
Interfund Transfers In	261	51%	52%	44%	46%
Interfund Transfers Out	273	75%	76%	83%	83%
Pension Top Ups	237	97%	97%	100%	100%
Frozen Refunds	1,555	95%	95%	90%	90%
New Starters	0	-	-	-	-
Pension Transfers In	231	93%	93%	96%	96%
Pension Transfers Out	230	88%	88%	97%	97%
<b>TOTAL</b>	<b>2,961</b>	<b>86%</b>	<b>86%</b>	<b>85%</b>	<b>85%</b>

Administration Performance - 1<sup>st</sup> January 2019 – 31<sup>st</sup> March 2022

