

## 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 monitors performance against the [Occupational and Personal Pension Schemes \(Disclosure of Information\) Regulations 2013](#), which set out the statutory requirements regarding the disclosure of pension information.

Peninsula Pensions' will be reviewing the [Pension Administration Strategy](#) and targets included within it in the 2023 year, which includes the internal target for Peninsula Pensions and expected performance requirements from individual Fund employers. The information provided within this report is therefore based around the statutory targets as outlined above.

- 1.2 Performance targets are monitored on a monthly basis via a task management system and reporting tool within the pension database.
- 1.3 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 the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013 for the quarter ending 30<sup>th</sup> June 2023 was 91% (93% for High Priority procedures).

- 3.2 During the quarter, the team received 15 compliments.
- 3.3 Appendix 1 of the report provides a detailed breakdown of administration performance relating to the Somerset Pension Fund only for the quarter ending 30<sup>th</sup> June 2023, against the statutory Disclosure Regulations. It also includes a graph which shows the monthly trend analysis on the percentage of high, medium, and low priority cases completed within timescales since April 2022.
- 3.4 Appendix 2 of the report highlights the longer-term performance of Peninsula Pensions (Somerset Fund only) from 1<sup>st</sup> July 2022 to 30<sup>th</sup> June 2023. The bottom chart shows how many of the 'remaining' tasks outstanding to be actioned are awaiting information from another third party (member/employer) and therefore are on 'reply due'.
- 3.5 Appendix 3 of the report highlights the amount of work received over the previous 12 month rolling period, compared to the same period in the previous year. The chart currently is showing an increase in demand.

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

##### **4.1 New Employers**

1 April 2023 Taunton Town Council became an employer within the Somerset Pension Fund. It is a new Town Council following a move to one council, with a few staff involved with TUPE across and a couple joining externally.

11 May 2023 South Petherton Parish Council became an employer within the Somerset Pension Fund, allowing access to the LGPS for the Parish Clerk and the Assistant Parish Clerk.

##### **Academies**

1 June 2023 Huish Episcopi Academy joining United Learning Trust.

##### **Cessations**

30 April 2023 Abri ceased membership of the LGPS.

#### **5. Background Papers / Other updates**

##### **5.1 McCloud: Legislation published in July 2023: [The Public Service Pensions and Judicial Offices Act 2022](#)**

Peninsula Pensions have staff resource allocated to work on the McCloud remedy when required and are in a good position with regards to the data preparation that was essential in advance of the remedy. One of the Technical & Training Officers on the team is leading the project and is working with DLUHC as part of the 'Statutory Guidance working group', which will support the drafting of the new guidance for administrators. We are therefore confident that we will be able to have input and interpret the legislation as intended/accordingly.

##### **Recruitment:**

For information, following a successful recruitment exercise, Peninsula Pensions are now fully resourced with all new recruits in training currently.

### Administration Performance – 1<sup>st</sup> April 2023 – 30<sup>th</sup> June 2023 (Somerset Pension Fund)

#### Performance Summary

	Total Cases	Performance (Disc Regs)
High Priority Procedures	1829	93%
Medium Priority Procedures	2582	90%
Low Priority Procedures	547	91%
<b>TOTAL</b>	<b>4958</b>	<b>91%</b>

#### High Priority Cases

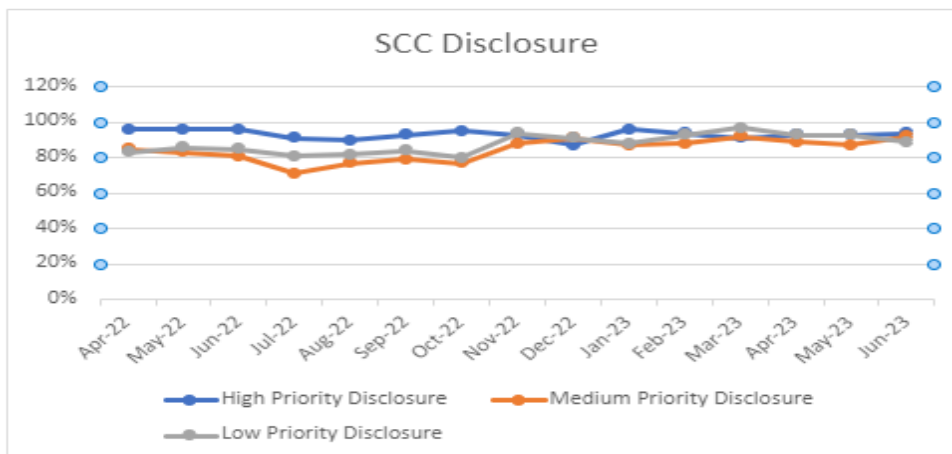
	Total Cases	Performance (Disc Regs)
Changes	231	96%
Complaints (Member)	17	100%
Complaints (Employer)	0	-
Deaths	214	78%
Deferred (over 55)	176	98%
Payroll	445	97%
Refunds	83	99%
Retirements (Active)	183	95%
Retirements (Deferred)	480	93%
<b>TOTAL</b>	<b>1829</b>	<b>93%</b>

**Medium Priority Cases**

	Total Cases	Performance (Disc Regs)
Amalgamation of Records	394	79%
Deferred Benefit Calculations	602	75%
Divorce Calculations	6	100%
Employer Queries	89	70%
Estimates (Bulk)	0	-
Estimates (Employer)	77	100%
Estimates (Member)	44	93%
General	429	100%
HMRC	7	100%
Member Self-Service	934	100%
<b>TOTAL</b>	<b>2582</b>	<b>90%</b>

**Low Priority Cases**

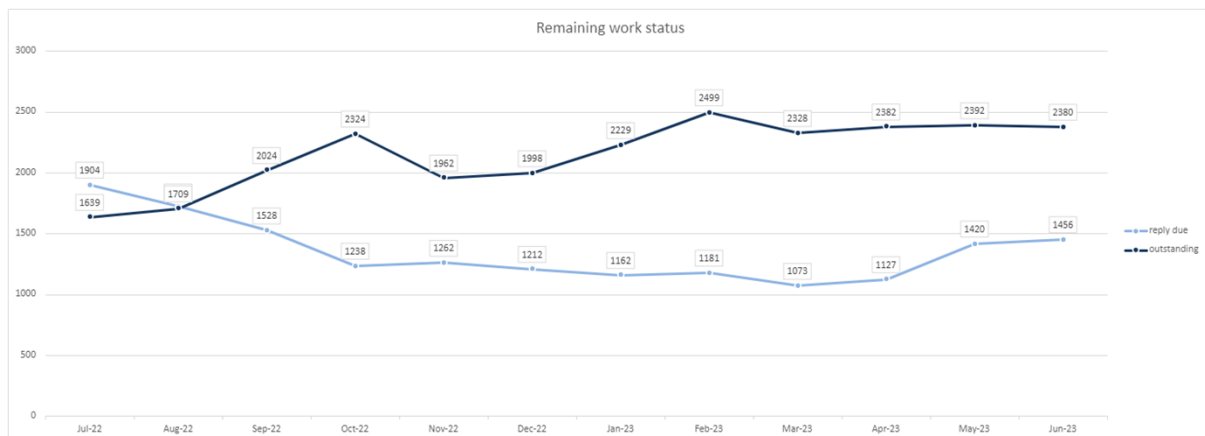
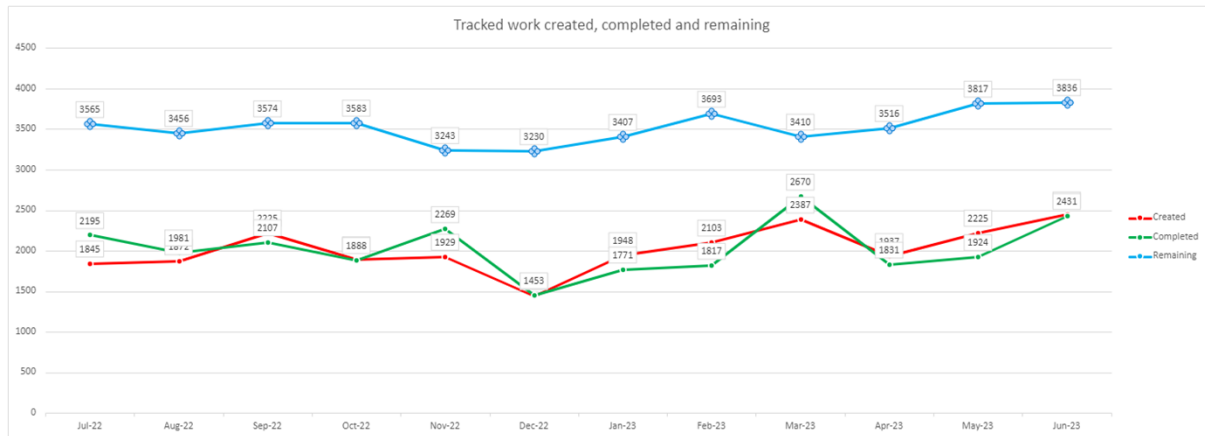
	Total Cases	Performance (Disc Regs)
Estimates (Other)	28	96%
GMP Queries	4	100%
Interfund Transfers In	61	79%
Interfund Transfers Out	70	70%
Pension Top Ups	105	98%
Frozen Refunds	220	97%
New Starters	0	-
Pension Transfers In	29	90%
Pension Transfers Out	30	100%
<b>TOTAL</b>	<b>547</b>	<b>91%</b>



Administration Performance

1<sup>st</sup> July 2022 – 30<sup>th</sup> June 2023

Month	Created	Completed	completion rate	Remaining	reply due	outstanding
Jun-23	2450	2431	99.22%	3836	1456	2380



**Work received 12 month rolling period 1<sup>st</sup> July 2022 – 30<sup>th</sup> June 2023  
(against same period for previous financial year)**

from	to	Work Created	Work Completed	Average Monthly Work Remaining
01/07/2021	30/06/2022	24166	23783	3865
01/07/2022	30/06/2023	24258	24337	3528

