

## Buckinghamshire Pension Board

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<b>Title:</b>	<b>Pensions Administration Performance</b>
<b>Date:</b>	21 July 2016
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<b>Electoral divisions affected:</b>	n/a

### Summary

The Pensions & Investments Team have a customer charter <http://www.buckscc.gov.uk/about-your-council/local-government-pension-fund/customer-charter/> outlining their commitment to turning work around within certain timescales. All post and requests for information are logged daily and reported on monthly to monitor the percentage of work that is not completed within the prescribed time limits.

Details of the work performance statistics for the 12 months to June 2016 are presented overleaf. The Buckinghamshire Pension Board is required to monitor the performance of the Pensions Administration Team.

### Recommendation

**The Board is asked to NOTE the performance statistics of the team.**

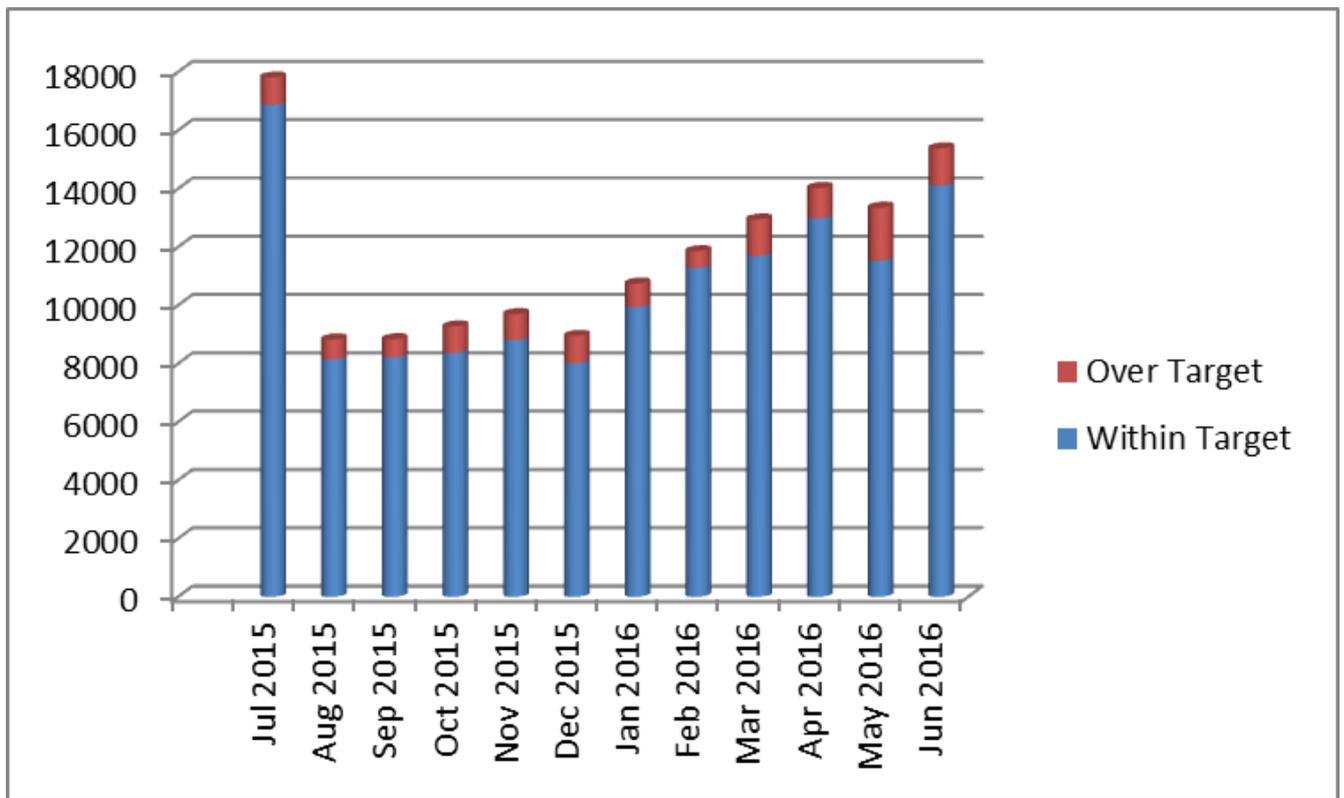


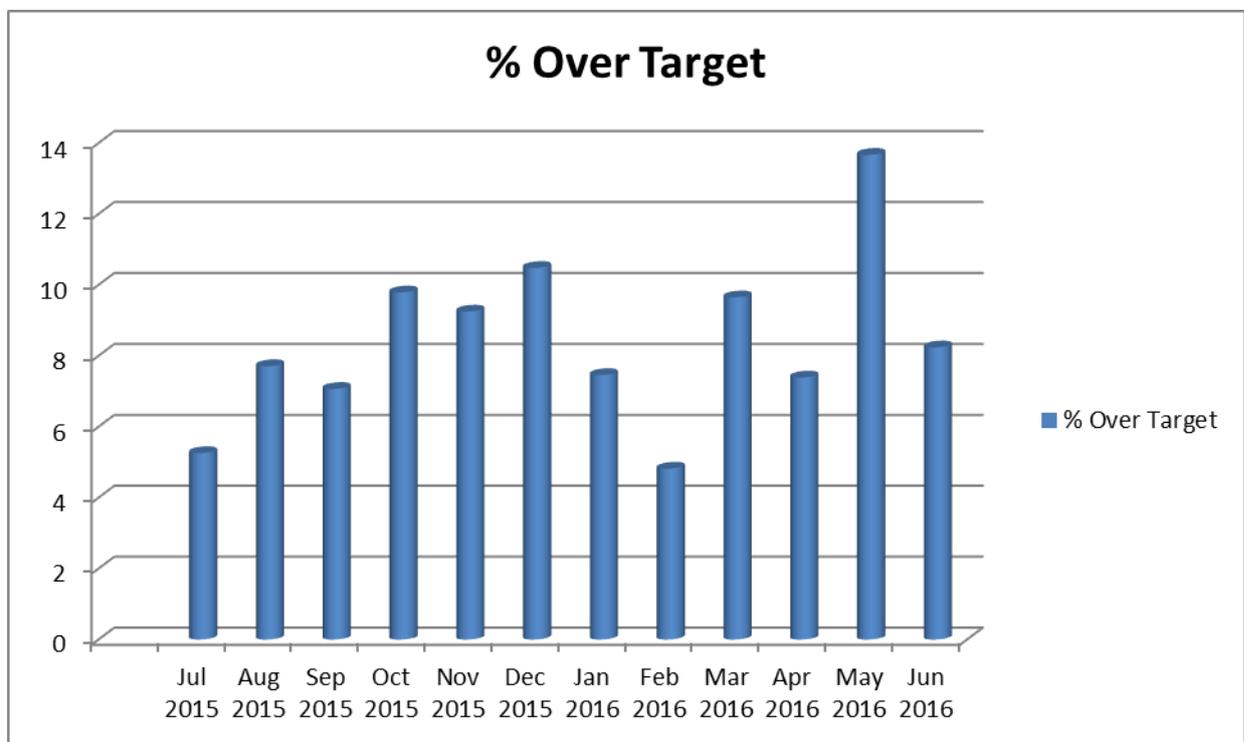
INVESTOR IN PEOPLE



Workload statistics for the year to June 2016 are presented below:

Month	Within Target	Over Target	Total	% Over Target
Jul-15	16,879	937	17,816	5.26
Aug-15	8,148	681	8,829	7.71
Sep-15	8,214	625	8,839	7.07
Oct-15	8,369	908	9,277	9.79
Nov-15	8,803	897	9,700	9.25
Dec-15	8,015	938	8,953	10.48
Jan-16	9,945	802	10,741	7.46
Feb-16	11,287	571	11,858	4.82
Mar-16	11,699	1249	12,948	9.65
Apr-16	12,989	1037	14,026	7.39
May-16	11,528	1826	13,354	13.67
Jun-16	14,117	1268	15,385	8.24





1. In the last Administration report in October 2015, it was noted that in the 2015 year the retirement tasks had rarely been below 100 and at points reaching a peak of 300. This was in addition to high levels of overall tasks, in particular with regards to leavers and transfers. The Benefit Administration team have successfully worked hard in order to clear the majority of backlogs in our priority areas as well as maintaining these groups on a daily basis. Our priority areas include Retirements, Deaths, Refunds, Divorce, Quote & AVC. The introduction of the Member Liaison Officers who form a service desk for all calls, has had a positive impact on the team in terms of how much work the Pensions Officers are able to complete on a daily basis. These posts, along with the additional posts recruited to in January/February 2016 has meant that we are able to keep up to date with the 'new' daily work as well as working through our backlogs.

As at July 2015, we had around 800 leaver tasks waiting to be worked on. Today, we have around 150 leaver tasks outstanding and although this may seem a high number these tasks are only 5 working days behind and are high mainly due to the volume of members leaving the scheme on a monthly basis. Whilst we do still have a high number of leaver checking tasks, we recruited a temporary Pensions Officer in February 2016 to work solely on these tasks. Since February, almost 4000 leaver check tasks have been completed.

Our main area of backlogged tasks now relates to transfers, in particular inter-fund transfers. The main factors which have contributed to this backlog includes the new 2014 scheme which resulted in these transfers becoming a lot more complex, waiting on updated guidance and then all transfers in and out of the LGPS were put on hold in March 2016 as the Government Actuary's Department were revising the factors to be used. We are now in a position to work on these transfers and staff have received some training with more scheduled for Thursday 13<sup>th</sup> July. A plan is also in place to work through these backlog of task whilst keeping on top of the priority areas of work that we are currently managing to maintain.

We have placed a lot of time and priority on training with the Benefit Administration team and the implementation of an LGPS Training Officer from January 2016 has meant that we have capacity to focus more on training new staff as well as keeping current staff up to date with changing regulations and guidance. By having all Pensions Officers eventually trained on all areas of LGPS administration this should give us the contingency for leave/meetings/sickness

as well as for when we have peak times, which is something we have struggled with over the past few years.

We are continually reviewing our procedures & processing in order to make sure that we are providing a high level of customer service. With the reduction in the backlog of tasks this has already seen a decrease in the level of complaints or members chasing. We are also focussing on trying to improve the information provided to us by employers as this would also aid us in providing good customer service. Three LGPS employer training sessions were arranged and completed at the beginning of July 2016 and a plan will be put in place to continue this going forward.

2. In the March 2016 report I reported to the board that 2016 was the triennial valuation year for the Buckinghamshire Pension Fund. Our year end returns for 2015-2016 were sent out in February 2016 requesting that they be returned by 30<sup>th</sup> April 2016. Of the 201 returns received 23 were received after the deadline. As at 12 July 2016, 3 are still outstanding.

I can confirm that all contribution and pay information for those returns have been recorded on member records and the creation of CARE scheme data for 2015-2016 has been achieved. This was one of the most important pieces of work undertaken to enable us to supply the valuation data.

Whilst the above information was being loaded, the Systems Team have been undertaking general housekeeping on member records, and have also run a provisional data extract, and have resolved errors and warnings arising from that.

On 11<sup>th</sup> July 2016, by way of Class Bulletin 495 issued by Heywoods, we have been made aware of a number of problems relating to the valuation extraction process. They have been in discussion with the relevant Actuaries, and will be issuing a number of additional reports that will need to be run, along with the valuation data extract. Whilst this will create additional work, the Systems Team are course to meet the 31 July deadline required.

**Other options available, and their pros and cons**

N/A.

**Resource implications**

The Pensions Administration teams are funded by the Pension Fund.

**Legal implications**

It is a statutory obligation for the County Council to provide a Pensions Service on behalf of Scheme employers.

**Other implications/issues**

None

**Feedback from consultation, Local Area Forums and Local Member views**

Not applicable.

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**Background Papers**

None

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