

Pension Fund Board

Title:	Administration Performance Statistics
Date:	Wednesday 19 July 2017
Author:	Finance Director, Business Services Plus
Contact officer:	Chris Thompson, 01296 382833
Local members affected:	n/a

For press enquiries concerning this report, please contact the media office on 01296 382444

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.

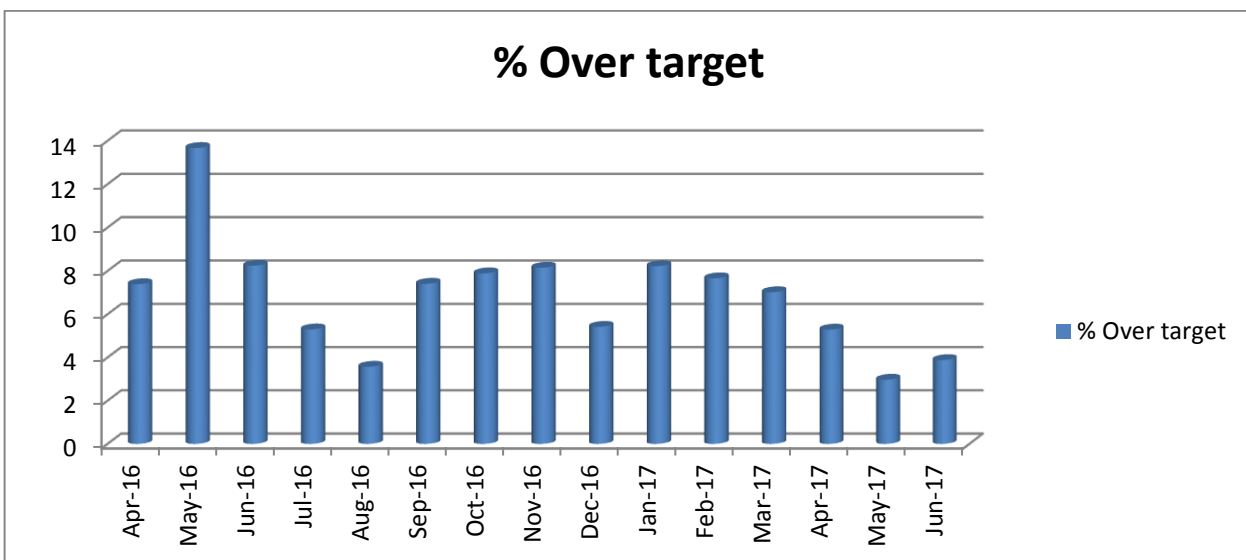
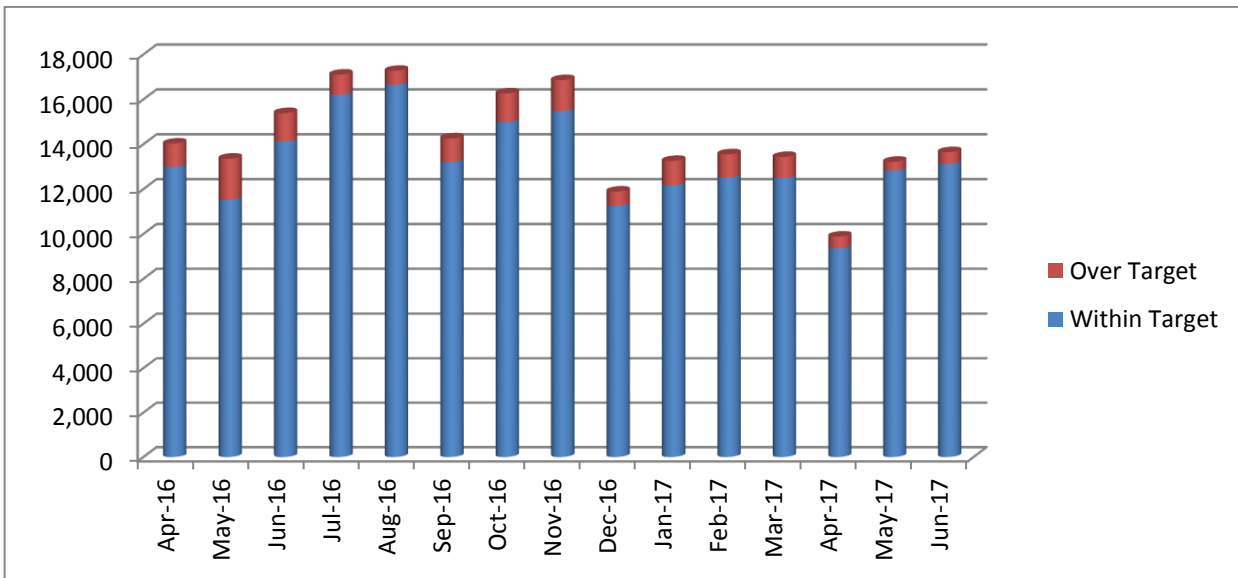
Details of the work performance statistics for the 15 months to June 2017 are presented overleaf. The Buckinghamshire Pension Board is required to monitor the performance of the Pensions Administration Team.

Recommendation

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

Workload statistics for the 15 months to June 2017

Month	Within Target	Over Target	Total	% Over target
Apr-16	12,989	1,037	14,026	7.39
May-16	11,528	1,826	13,354	13.67
Jun-16	14,117	1,268	15,385	8.24
Jul-16	16,196	906	17,102	5.30
Aug-16	16,656	616	17,272	3.57
Sep-16	13,203	1,056	14,259	7.41
Oct-16	14,985	1,284	16,269	7.89
Nov-16	15,481	1,374	16,855	8.15
Dec-16	11,243	644	11,887	5.42
Jan-17	12,164	1,089	13,253	8.22
Feb-17	12,512	1,038	13,550	7.66
Mar-17	12,488	943	13,431	7.02
Apr-17	9,359	523	9,882	5.29
May-17	12,821	393	13,214	2.97
Jun-17	13,116	530	13,646	3.88



1. The Benefit Administration Team (BAT) have continued to work hard to keep daily tasks up to date in priority areas as well as working through backlogs of work. At the Pension Board in March 2017, I reported that the backlog of over 1,000 interfund transfer tasks was cleared however this caused a backlog of checking. This checking backlog has now also been cleared however, the knock on effect of clearing all of these tasks is that we are now receiving a high volume of responses from members to proceed with the transfers so task levels remain high. In addition to this, the number of leaver notifications received as a result of year end has seen a rise in the level of leaver tasks.

The only current area of backlog is with regards to leaver checking. This has decreased from approximately 2,100 tasks to 1,600 tasks between March 2017 & the end of June 2017. It was the intention that this backlog would be cleared by the end of September 2017 however, due to the additional work caused by clearing the interfund transfer backlog & the year end leaver notifications we have not have the resource to allocate to the leaver checks as hoped. We will continue to work in this group where possible as well as using overtime hours.

The Benefit Administration Team have also not been at full capacity over the past few months in terms of staffing. Following successful recruitment, the team will be back to full capacity by mid-August which will help us clear any outstanding backlogs.

2. Number and trend of top 10 case types:

Please find below details of the top ten cases dealt with by the Administration team in 2016-17:

Case Type	Timeframe	Procedures Completed 2016/17	% Completed within target timeframe
1. New Starters set up	Within 20 working days	5696	98.19
2. Reply to general pension enquiry	Within 10 working days	5692	83.65
3. Preserved Benefit calculation	Within 20 working days	5519	18.86
4. Change of Address (pensioner and non-pensioner)	Within 10 working days	2114	99.48
5. Payroll record created	Within 1 working day	1495	97.39
6. Actual Retirements Processed	Within 10 working days	1455	21.24
7. Quotations of individual member benefits (both employee and employer requested)	Within 10 working days	1369	75.97
8. Refund of Pension Contributions	Within 10 working days	1087	92.55
9. Transfers (both LG and non LG)	Within 20 working days	1006	47.22
10. Process request to opt out of the LGPS	Within 10 working days	933	60.99

3. Five Year analysis of pension overpayments, recoveries and any amounts written off:

Please find below details of pensions overpayments, recoveries and any amounts written off:

Year	Cheque Payments received in respect of overpayments made	Total money recovered from monthly pension payments	Total Overpayments recovered	Total Overpayments written off	Total Overpayments
2012/13	£13,631.71	£11,811.86	£25,443.57	£1,698.98	£27,142.55
2013/14	£13,745.13	£7,437.83	£21,182.96	£303.92	£21,486.88
2014/15	£28,159.49	£7,572.34	£35,731.83	£25,525.50	£61,257.33
2015/16	£75,381.83	£10,163.30	£85,545.13	£3,940.65	£89,485.78
2016/17	£59,347.82	£13,718.99	£73,066.81	£9,398.16	£82,464.97

The above information is required for the Pension Fund Annual Report.

4. Please find below statistics for the end of June, regarding the roll out of Member Self Service (MSS):

Date of Report	27th June 2017
Status of Registration	Active Members
Not Registered	14505
Activation Key Sent (In process)	381
Registered	7644
Other Status	36
Total Active Membership	22566
To Date Totals	
Percentage of Active Members signed up	33.87%
Percentage of ALL STATUS MEMBERS signed up	17.90%
Percentage in Active Members in process	1.69%
Member Opt Out Percentage (All member statuses)	2.52%
Total Opt Outs Received	1688
Employer	Percentage Members Signed Up
Ringway Jacobs BCC	82.50%
Wycombe DC	67.68%
Thames Valley Police	66.00%
Chiltern DC	60.71%
Bucks New Uni	58.44%
South Bucks DC	58.20%
Aylesbury Vale District Council	39.66%
Milton Keynes Council	26.31%
Buckinghamshire County Council	23.45%
Other Statuses	
Deferred Members Signed up	2259
Pension Members Signed up	2089
Percentage of Deferred Members signed up	8.50%

Percentage of Pension Members Signed up	11.69%
---	--------

Members of the systems team are currently working with Aylesbury Vale District Council to promote the MSS Facility.

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 (if relevant)

Not applicable

Background Papers

None
