Pension Fund Board

Title:	Administration performance statistics
Date:	Wednesday 18 December 2019
Author:	Mark Preston Head of Finance - Pensions, Investments & Projects
Contact officer:	Sam Price, 01293 383370
Local members affected:	N/A

Summary

The Buckinghamshire Pension Board is required to monitor the Pensions Administration Team. The purpose of this report is to provide the Board with a review of the Administration Teams performance since the last Board meeting.

Recommendation

The Board is asked to NOTE the content of this report.

The Benefit Administration team are continuing to successfully maintain the priority areas of work on a daily basis. The following table shows the average number of individual communications received into the team on a daily basis, over the first three quarters of 2019/2020.

	Q1 19/20	Q2 19/20	Q3 19/20 to date	Q4 19/20
Post	2555	2626	2838	
Emails	4558	5409	5455	
MSS Registration Emails	*2044**	*2044**	2044	
Telephone calls – Members	2427	2481	2288	
Telephone calls – Employers	219	221	208	
Telephone calls – Other*	347	464	693	
Employer Liaison Inbox	*93**	*93**	93	
TOTAL Communications	**12,243**	**13,338**	**13619**	
Total Communications per day (average)	204	218	216	

Of the 3,189 calls received in quarter 3, 84% were answered within 59 seconds. The team have been working towards achieving a minimum of 90%. As per discussion at the previous Board meeting, it was agreed that it would be useful to report on average call waiting times.

After reviewing & adjusting the reporting, the target has been updated to 'answer calls with a queue time of less than 40 seconds'.

The following table illustrates the completed work by the Administration team between 1st October 2019 and 31st December 2019 including monitoring against relevant key performance indicators.

BENEFIT ADMIN	Outstanding at beginning of period	New workflow created	Outstanding at end of period	Number of tasks completed	Benchmark Target	Achieved %
Retirements	666	827	559	934	30 working days	92.05%
Frozen Refund	68	395	49	414	10 working days	97.08%
Actual Refund	13	211	10	214	10 working days	97.35%
Change	6	944	5	945	10 working days	99.67%
Divorce pack	2	47	2	47	10 working days	97.67%
Actual Divorce	1	1	2	0	10 working days	N/A
Estimates	38	372	18	392	10 working days	95.60%
Leaver (new)	193	559	83	669	10 working days	75.25%
Leaver (old)	370	20	311	79	10 working days	N/A
Member query	58	801	49	810	10 working days	94.83%
Additional Pension Conts Start	5	23	6	22	10 working days	76.19%
AVC Start/Change	1	32	0	33	10 working days	96.77%

At the December 2019 meeting, the Board asked for reporting on death procedures to be split out between the status of scheme members. The table below provides this split.

DEATHS	Outstanding at beginning of period	New workflow created	Outstanding at end of period	Number of tasks completed	Benchmark Target	Achieved %
Active members	7	4	3	8	30 working days	42.86%
Deferred members	9	32	15	26	30 working days	66.67%
Pensioner members	67	111	74	104	30 working days	63.13%
Widow/ Dependants	11	25	16	20	30 working days	75.00%

PAYROLL	Outstanding at beginning of period	New workflow created	Outstanding at end of period	Number of tasks completed	Benchmark Target	Achieved %
Retirement set-ups	2	197	6	**193**	5 working days	**99.48%**
Refunds set-ups	5	189	4	**190**	5 working days	**99.47%**
Deaths set-ups	4	115	7	**112**	5 working days	**96.30%**
Adjustments	0	29	13	**29**	10 working days	**100%**
Query	2	49	2	**49**	10 working days	**95.56%**
Changes	15	169	13	**171**	10 working days	**99.03%**

The Benefit Administration team have a 90% daily completion target on all priority tasks (retirements, deaths, refunds & annual allowance). For the period 1st October 2019 to 31st December 2019, a **94% completion rate** was achieved.

The following table provides an update relating to year end-queries and how these are progressing against set targets.

	As at 31/03/2019	Target Reduction by 31/03/20		End December	
BYKE	182	*50%*	*91*	**88**	
BKYE16/17/18	286	*80%*	*57*	BKYE16	47
				BKYE17	22
				BKYE18	29
				TOTAL	**98**
YEND				**346**	

Updated guidance

No further factors or guidance have been issued since July 2019.

Scheme changes

We are still waiting for confirmation as to how the outcome of the McCloud case will impact the LGPS. Previous recommendations to improve the scheme benefits were put on hold awaiting the outcome. These recommendations included changes to the scheme contributions bandings, setting a minimum death grant level for those who die in active service and also the removal of Tier 3 ill health.

We are aware that any remedial action could result in extensions to the underpin. In order to calculate the underpin at retirement, we would require all hours changes and service breaks for scheme members since April 2014 which we currently do not require. We are currently communicating this to employers in preparation. If this remedial action does take place, this will also require us to review retirements, deaths and transfers since 2014. We have been advised to expect a consultation on the LGPS regulation changes start in the spring although a delay is expected for any new regulations to come into force (depending on level of changes to primary legislation).

<u>Current projects</u>

Data Improvement – A data improvement plan is in place with the aim to address data quality issues and to ensure tPR requirements are met & that member records are accurate. The Administration Team had been working through areas which require improvement and by November 2019 increased the data score for common data from 91% to 93% and scheme specific data from 86% to 95.1%. A further report was received in December 2019 and the team have been working through data error's, completing around 1500 cases by the end of February 2020.

Unitary – With the new Buckinghamshire Council going live in April 2020 there will be an impact on the workloads of the Administration team. In preparation for this, we have issued employers with a special newsletter with a further update being sent this month. All active scheme members from each of the five employing authorities have been sent a newsletter providing details of the impact on their LGPS membership & any options available to them. Additional member surgeries were scheduled for January, February & March 2020 to account for expecting increase in queries & the team are attending 9 'drop in' sessions at various locations to answer any member queries.

A high volume of work has been created due to the new Authorities re-branding. This means that all letters, guides, forms, policies and any other documents must be updated with the new branding by 1st April 2020. This is currently being worked on and is on track to be completed by the deadline.

Supporting information to include the following if a decision is being requested:

Resource implications

N/A

Legal implications

None

Other implications/issues

N/A

Feedback from consultation, Local Area Forums and Local Member views (if relevant)

N/A

Background Papers

N/A