



Report to Pension Fund Consultative Group

Title: Pensions Administration Performance

Date: 19th March 2009

Date Decision can be implemented: n/a

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Electoral Divisions Affected: N/A

Portfolio Areas Affected: All

Summary

The pensions admin team have a customer charter (<http://www.buckscc.gov.uk/bcc/content/index.jsp?contentid=-1901867351>) 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 last 12 months to February 2009 are presented below. The Pension Fund Consultative Group are required to monitor the performance of the Pensions Administration Team.

Recommendation

Members are asked to:

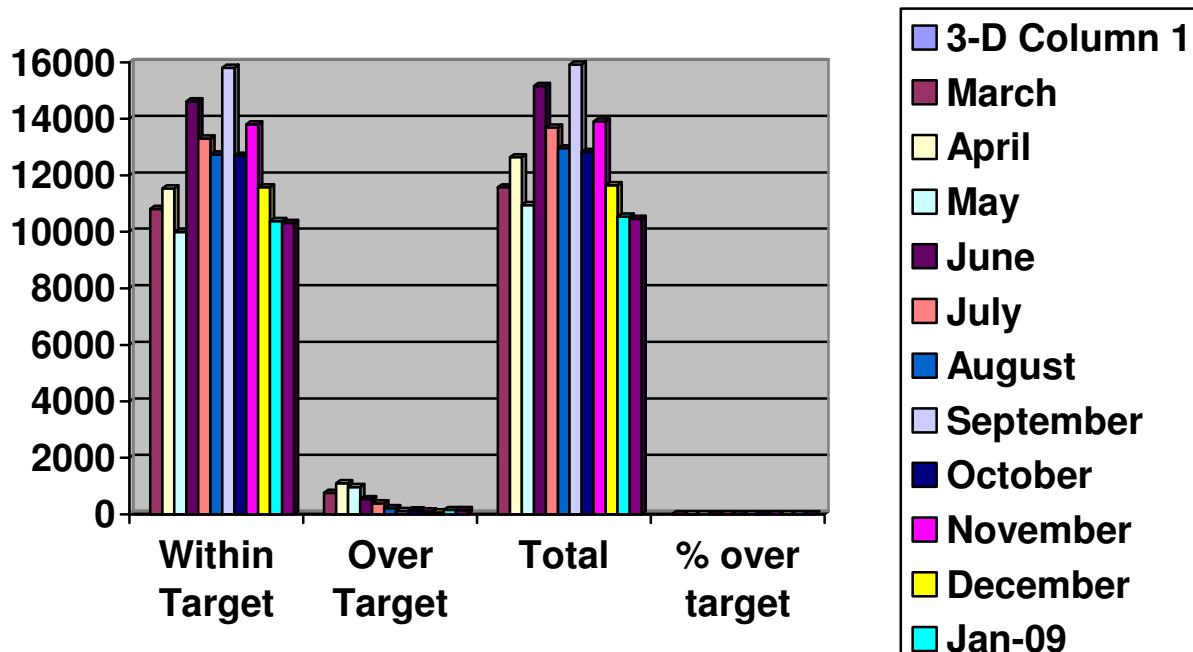
PFCG are asked to NOTE the performance statistics of the team.

A. Supporting information:

Workload statistics for the year to February 2009 are presented below. In the past twelve months the section has seen the implementation of the new Pension Scheme. Despite expectations, this did not see a significant increase in the number of queries received and this can be in part attributed to the successful communication of the changes to scheme members and employers.

Workloads have remained high over the past year with a significant increase taking place in June 2008 and September 2008, although the workloads have dropped back from the high recorded in September 2008. The number of tasks being completed over target has remained relatively low since a high of 8.81% in May 2008 given the number of tasks being completed each month.

	Within Target	Over Target	Total	% over target
March	10820	759	11579	6.55%
April	11543	1102	12645	8.71%
May	9985	965	10950	8.81%
June	14619	539	15158	3.56%
July	13303	390	13693	2.85%
August	12743	219	12962	1.69%
September	15805	114	15919	0.72%
October	12691	142	12833	1.11%
November	13801	105	13906	0.76%
December	11582	73	11655	0.63%
January 2009	10390	155	10545	1.47%
February	10317	146	10463	1.40%



To provide more qualitative data, two procedures have been selected for the month of February 2009. Deaths and employer requested estimates (ill health, redundancy, efficiency, employer consent and flexible retirements).

In February 2009, pensions received 29 new notifications of death. All initial death letters, offering condolences and confirming the information required by Pensions to process any further benefits due, were sent out on the same day as notification of death was received. In February 24 death cases (all calculations performed, benefits paid and notification of benefits sent) were completed in total (the outstanding amount can be accounted for by information outstanding from next of kin). Of the 24 cases completed, 4 required recalculation of benefits due by a Pensions Officer resulting in the case being completed over target. 3 of the cases involved AXIS system issues which where appropriate have been resolved or raised with AXIS software supplier, Heywoods.

In February 2009, 28 employer estimates were provided. Of these 2 were provided outside of target. Both were in respect of employees whose employment is of a variable nature (i.e they do not work set hours each week) and required the Pensions Team to assess information supplied by the employer.

To give an indication of other volumes of work during the month of February, the Pensions team processed 323 general queries (not including telephone queries), 210 leavers (non retirements) and set up 325 new starter records.

To date 110 queries have been received in response to the issuing of Annual Benefit Statements, of which approximately half have been general queries such as wrong address held for the member, or the member wishes to make a death grant nomination.

B. Other options available, and their pros and cons

N/A

C. Resource implications

The Pensions Administration team is funded by the Pension Fund.

D. Legal implications

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

E. Other implications/issues

There are none.

F. Feedback from consultation and Local Member views

None