



Report to Pension Fund Consultative Group

Title: Pensions Administration Performance

Date: 9th October 2009

Date Decision can be implemented: n/a

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Electoral Divisions Affected: N/A

Portfolio Areas Affected: All

Summary

The Pensions Administration 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 August 2009 are presented below. The Pension Fund Consultative Group are required to monitor the performance of the Pensions Administration Team.

Recommendation

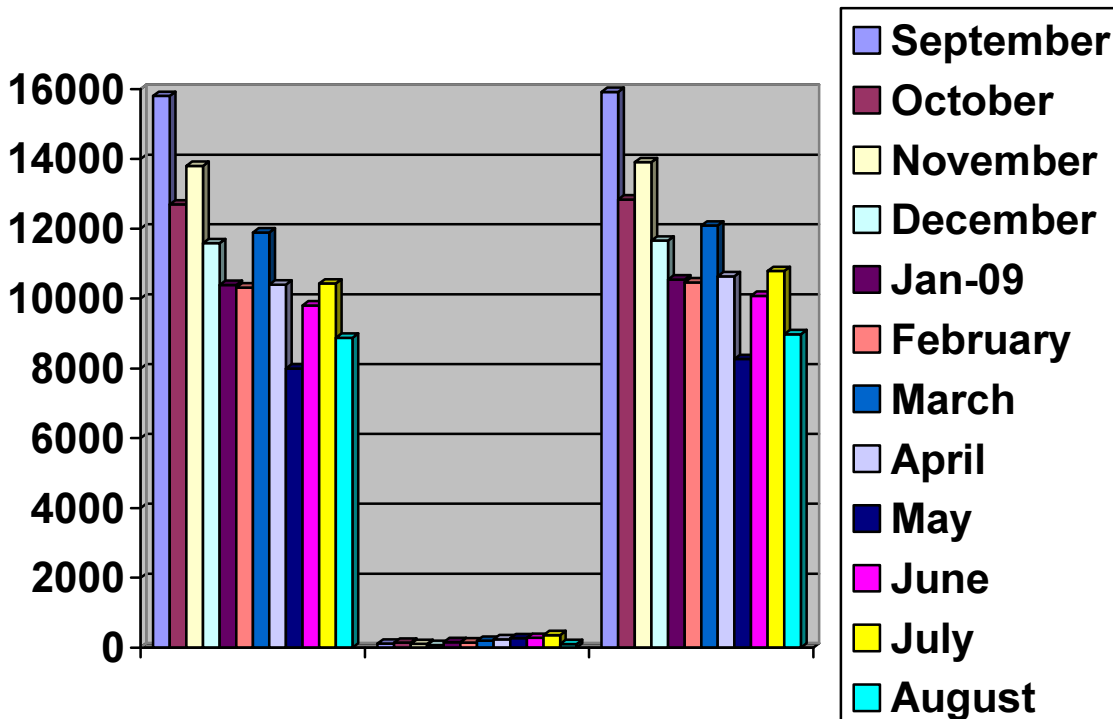
Members are asked to:

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

A. Supporting information:

Workload statistics for the year to August 2009 are presented below:

	Within Target	Over Target	Total	% over target
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%
March	11888	197	12085	1.63%
April	10398	237	10635	2.23%
May	7999	272	8271	3.29%
June	9802	278	10080	2.76%
July	10429	356	10785	3.30%
August	8878	100	8978	1.11%



In addition to the normal daily work, the Pensions Team are in the process of issuing annual benefit statements to deferred pensioners. In 2009, 12,060 annual statements are being issued to home addresses.

To provide more qualitative data, two procedures have been selected for the month of June 2009.

In June 2009, pensions responded to 605 queries generated. Of these 605 queries, 551 were responded to within the required 10 day period. The queries were generated both internally (i.e from within the pensions team as part of our annual processes of applying Pensions Increase and year end procedures) but also externally from scheme members and other outside bodies such as HMRC and the Department of Work and Pensions (DWP).

Of the 54 queries that were not dealt with within the 10 day turnaround, approximately half of these were as a result of responses being sent back by the relevant checker for amendment or recalculation. Such cases enabled us to address any training needs. The

remainder were processed out of time unfortunately due to the relatively high volume of queries that needed to be dealt with.

Also in June 2009, we were notified of 25 new deaths. In all cases, our initial letter offering condolences and requesting all relevant certificates and documents were issued on the same day as the Pensions Team were notified of the death.

To give an indication of other volumes of work during the month of June, the Pensions Team were notified of 134 new leavers from the scheme (not including retirements), were requested to produce 122 estimates of retirement benefits (to both scheme members and scheme employers) and set up 84 new starter records.

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