Report to Pension Fund Consultative Group

Title: **Pensions Administration Performance**

Date: **9th October 2013**

Date Decision can be implemented: **n/a**

Author: **Principal Pensions Officer**

Contact Officer: **Chris Thompson 01296 382833**

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 2013 are presented below. The Pension Fund Consultative Group are required to monitor the performance of the Pensions Administration Team.
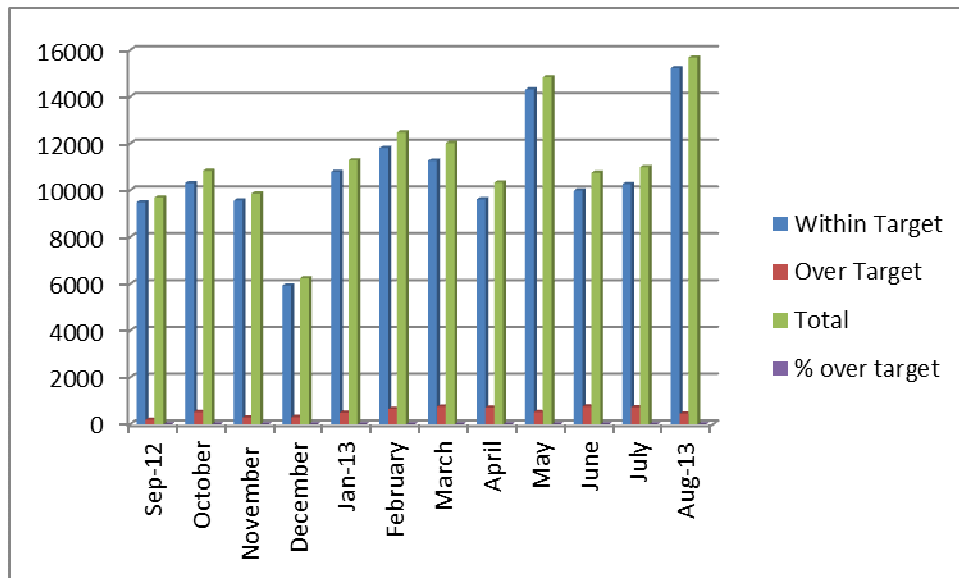
Recommendation

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 2013 are presented below:

	Within Target	Over Target	Total	% over target
September 2012	9496	194	9690	2.00%
October	10315	524	10839	4.83%
November	9571	296	9867	3.00%
December	5935	312	6247	5.00%
January 2013	10790	493	11283	4.37%
February	11821	660	12481	5.29%
March	11274	755	12029	6.28%
April	9620	718	10338	6.95%
May	14318	526	14844	3.54%
June	9992	764	10756	7.10%
July	10270	727	10997	6.61%
August 2013	15229	453	15682	2.89%

To give an indication of the volumes of work, in August 2013 42 new deaths were reported to the Pensions Section, which is relatively high compared with previous Augusts. It is the teams aim to issue, on the same day as notification of death is received, a letter to the next of kin or persons dealing with the estate of the deceased a letter confirming our information requirements. In August 2013 this target was achieved. In August were also notified of 65 new retirements and also calculated 350 preserved benefit early leavers.

At the beginning of each working day the team are sent a list of outstanding work for the day. For much of 2013 the starting total has been in excess of 1000 work tasks per day, reaching as high as 1900 in April. Benefit Administration team members were diverted to assist with year end queries to ensure that the valuation data was sent to the Actuary. Additional resource has now been brought in to tackle particular areas such as leavers and to assist with pensioner payroll. This has seen the starting tasks each reducing to below 1000 and the trend is downward.

PFCG may also recall that previously it was mentioned that the Pensions Team would be implementing Employer and Member Self Service. These are additional services which allow employers to access their employees data and for members to access their own. This project has now been resourced and a project plan drawn up. The Pensions Team will be undertaking site visits to learn from the experiences of other authorities and then we will be contacting those who expressed an interest in being test sites.

Finally we would like to draw to the attention of the consultative group, the Pensions General meeting has been scheduled for 28 November with an additional employer training day for 13 December. One of the main areas to be covered will be the new 2014 scheme. There are also a number of employee presentations arranged to cover the new scheme. We would strongly recommend that your employees are encouraged to attend. Details of the presentations were provided in the September newsletter.

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