



# Report to Pension Fund Consultative Group

**Title:** Pensions Administration Performance

**Date:** 8<sup>th</sup> October 2014

**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 2014 are presented below. The Pension Fund Consultative Group are required to monitor the performance of the Pensions Administration Team.

## Recommendation

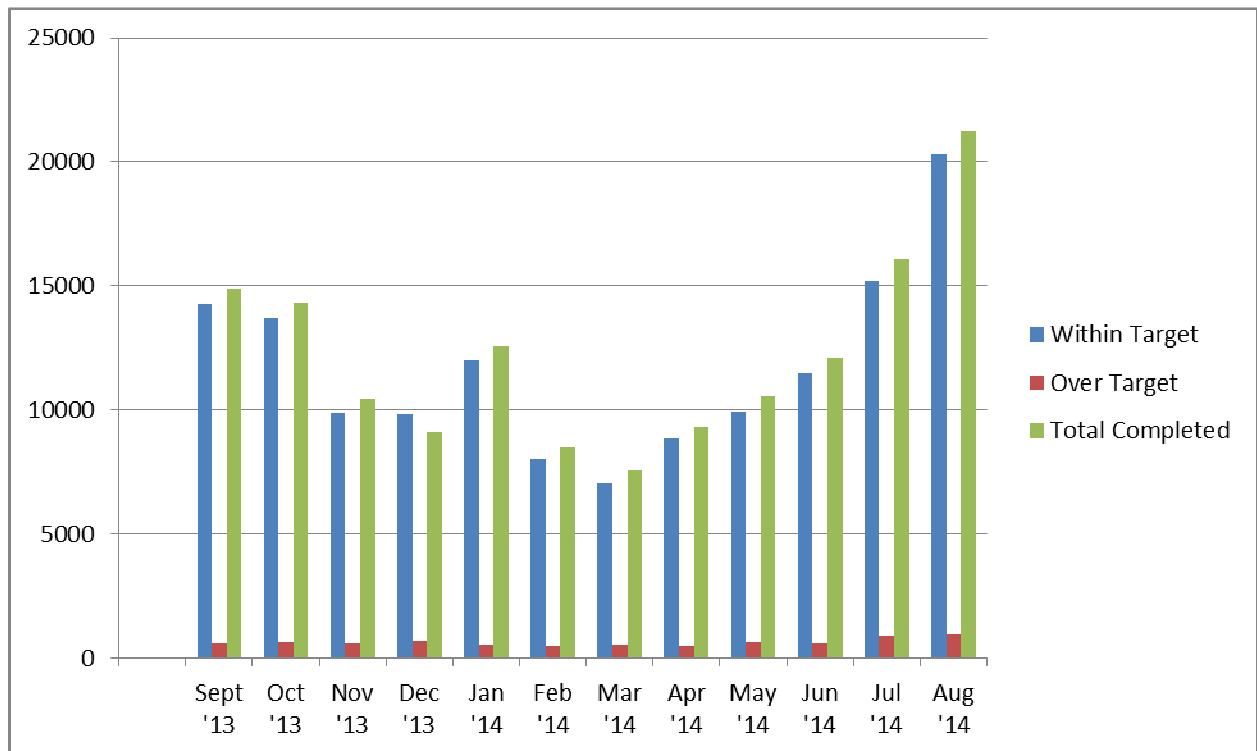
**Members are asked to:**

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

## A. Supporting information:

Workload statistics for the year to August 2014 are presented below:

Month	Within target	Over Target	Total	% over target
September	14253	612	14865	4.12
October	13703	632	14335	5.00
November	9880	564	10444	5.40
December	9827	708	9119	6.20
January 2014	12001	539	12540	4.30
February	8009	475	8484	5.60
March	7035	516	7551	6.83
April	8851	460	9311	4.94
May	9913	624	10537	5.92
June	11479	609	12088	5.04
July	15201	887	16088	5.51
August	20314	930	21244	4.38



To give an indication of the volumes of work, I draw your attention to the increase in the number of tasks completed in August 2014. To ensure where possible that Buckinghamshire County Council meets its statutory obligation to issue Annual Benefit Statements (ABS's) by 5<sup>th</sup> October, the Employer Liaison Team (ELT) processed almost 1500 year end tasks, these are tasks generated from queries arising on information supplied by employers on the year end contribution return. All employers who have received and responded to queries raised by the ELT, their employees will have annual benefit statements issued by the Pensions Department by 5<sup>th</sup> October 2014. Results of the Annual Benefit Statement survey are attached as Appendix 1.

On the day to day administration tasks remain high. To give an indication of work volumes in August 2014, 371 new retirement calculations were performed. These will have included retirements from active employment and also retirements from deferred status (former employees who have left employment and have reached retirement age). 720 queries were responded to. Queries cover the whole range of benefit administration from people enquiring about previous scheme benefits, to potential retirement and death benefits and also queries from pensioners about tax codings issued by HM Revenue and Customs. The number of daily retirement tasks remain high and the Benefit Administration Team treat this group as high priority and allocate the necessary resources.

Whilst the number of tasks not being completed remain the range of 4-7% the team are confident that the benefits of our current trainee officers will soon be felt as they progress through their training.

In addition a temporary structure in the Systems team has been put in place from 6<sup>th</sup> October 2014. This is to facilitate progress in a number of systems projects such as Employer Self Service and Member Self Service. Whilst progress is being made it has at times been frustratingly slow so it is hoped that this restructure will give renewed impetus to these projects.

In addition PFCG should be aware that a major project will soon be coming on line. Guaranteed Minimum Pension (GMP) reconciliation is linked to the ending of the contracted out status of the Local Government Pension Scheme (LGPS) in 2016 and will involve contracting out data being received from HMRC regarding scheme members, deferred and pension members and the Pensions Team having to reconcile the data provided by HMRC with the information held on the pensions database.

**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