



Report to Pension Fund Board

Date: 16 March 2022

Title: Administration Performance Statistics

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

Executive summary

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

Content of report

1.2 The following areas of performance have been covered in this report:

[Incoming Communications](#)

[Workload/Performance Measures](#)

[Data Improvement](#)

Incoming Communications

We receive a high volume of communications into the Pensions Administration team from scheme members, employers & others. Sub-teams are very proactive in processing these within set timeframes to ensure that requests can be dealt with as quickly and efficiently as possible.

The following table provides an analysis of the incoming communications received between 1 January 2022 and 28 February 2022.

Type of incoming communication	Number received	Number received
Post	1,560	878
Pensions Inbox	2,885	3,863
Employers Inbox	255	371
Monthly Returns Inbox	155	137
'My Pension Online' registration/query Inbox	2,186	2,128
Document uploads via 'My Pension Online'	322	399
Telephone calls	3,006	2,324
Total Communications	10,369	10,100
<i>Ave. Daily Communications</i>	<i>241</i>	<i>246</i>

Each sub-team that is responsible for the areas of communication above have a set target for responding or dealing with the communication within. The table below provides details of the targets and performance against these targets within the quarter.

Type of incoming communication	Target	Achieved	Previous
Post	Same day*	100%	100%
Pensions Inbox	Same day*	100%	100%
Employers Inbox	10 working days	100%	100%
'My Pension Online' registration/query Inbox	Same day	100%	100%
Document uploads via 'My Pension Online'	1 working day	95.16%	98.2%
Telephone calls	Ave queue time < 40 sec	21 sec	24 sec
	Ave calls answered > 97%	98.4%	98%

*The same day target is for Pensions Assistants to process each individual item by uploading the document to the scheme members pension record and creating the relevant workflow/updating the existing workflow.

Workload/Performance Measures

We have a priority target relating to the main areas where scheme members will be waiting payment of a benefit and we prioritise daily to ensure a quick turnaround. This target has been to achieve a minimum of 95% of priority tasks completed within relevant turnaround times and this is reported on quarterly. The table below shows the achieved percentages for each quarter of 21/22 so far.

Quarter 1 2021/22	94.50%
Quarter 2 2021/22	96.45%
Quarter 3 2021/22	94.82%
Quarter 4 2021/22 (to 28 February)	96.86%

These priority areas of work include retirements, deaths, AVC's at retirement & refunds. The tables below provides the Board with statistics relating to all areas of pension administration workloads based on in department turnaround times. This is based on stats 1 January 2022 and 28 February 2022.

Benefit Administration – Priority areas

	Case Completion Statistics				
	Percentage achieved	<i>Previous percentage achieved</i>	Cases open at the beginning of the period	Total new cases created during the	Total cases completed during the
Retirements	98%	98%	466	612	625
Deaths	98%	95%	90	180	145
AVC's at Retirement	80%	60%	7	14	8
Refunds	98%	94%	262	389	404

Benefit Administration

	Case Completion Statistics				
	Percentage achieved	Previous percentage achieved	Cases open at the beginning of the period	Total new cases created during the period	Total cases completed during the period
Opt outs	100%	94%	13	121	122
Additional Contributions	98%	98%	0	47	46
Estimates	98%	99%	87	192	181
General query	99%	99%	173	278	278
Financial Advisor query	95%	99%	46	70	75
My Pension Online' query	100%	100%	0	119	119
Divorce	100%	91%	7	25	25
Transfers	74%	69%	81	231	236
Interfund Transfers	95%	92%	132	709	637
Aggregation	62%	66%	1006	615	508
Complaints	100%	87%	2	9	11
Deferred Benefits	94%	88%	363	574	634
Change	67%	72%	10	94	93
New starter creation	92%	96%	83	1218	1300

To breakdown the change category, 20% relate to address changes, 72% to personal details changes and the remaining 8% relates to death grant nomination updates/changes. The volume of change cases is low as members are able to make these change (except hours changes) themselves via 'My Pension Online'

Payroll

	Case Completion Statistics				
	Percentage achieved	Previous percentage achieved	Cases open at the beginning of the period	Total new cases created during the period	Total cases completed during the period
Payroll set-ups	99%	96%	2	599	581
Payroll queries/adjustments	96%	90%	25	271	261

In addition to reporting & reviewing turnaround statistics, we are also now reviewing the total open cases on a monthly basis to identify overdue cases and look at how to reduce these. The table below provides details of all open cases as at the end of February 2022, split by area of work & also cases overdue.

	Open cases	Overdue	Overdue > 3m
Death	122	34	47%
AVC at Retirement	12	4	67%
Divorce	2	0	N/A
Retirement	361	158	72%
Transfers in	46	16	25%
AVC/APC	24	10	25%
Aggregation	728	341	26%
Query	35	15	29%
Interfund Transfer in	256	68	36%
Quote	36	4	0%
Change	11	5	20%
Leaver	495	286	77%
Opt Out	24	14	15%
Refunds	150	150	77%
Starters	25	19	39%
Interfund Transfer out	57	30	55%
Transfers out	25	10	33%
Annual Allowance	3	0	N/A
Payroll	102	3	30%
TOTAL	2530	1192	

Of the total overdue cases, 67% of these cases are classed as 'external' meaning we are unable to proceed as a result of either waiting on information from an employer, scheme member or a third party. On a monthly basis, the overdue cases in each work area are reviewed by a Senior Pensions Officer to see whether further action needs taken and how to progress these cases.

Data Improvement

The Pension Administration Team continue to review data quality reports and take steps to correct any errors. These reports can now be obtained frequently via a recently purchased reporting tool called Insights. These reports compare the data held on scheme member records against The Pension Regulators data requirements.

As at 28 February 2022, the data scoring for common data held was 96% and scheme specific data was 98.67%

The main area for data improvement within the common data relates to addresses for deferred scheme members. We have instructed ADS, a company offering tracing services, to trace deferred scheme members who are age 55 and above. They will also complete verification before providing us with current addresses to update scheme member records.

