Report to Pension Fund Board

Date: 27 July 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 April 2022 and 30 June 2022.

Type of incoming communication	Number received	Previous received
Post	1,699	1,560
Pensions Inbox	5,518	2,885
Employers Inbox	647	255
Monthly Returns Inbox	85	155
'My Pension Online' registration/query Inbox	2,216	2,186
Document uploads via 'My Pension Online'	427	322
Telephone calls	3,559	3,006
Total Communications	**14,151**	**10,369**
Ave. Daily Communications	*236*	*241*

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	100%	95.16%
Telephone calls	Ave queue time < 40 sec	18 sec	21 sec
	Ave calls answered > 97%	98.6 %	98.4%

*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 22/23 so far.

Quarter 1 2022/23	97.17%
Quarter 2 2022/23	TBC
Quarter 3 2022/23	TBC
Quarter 4 2022/23	TBC

These priority areas of work include retirements, deaths, AVC's at retirement & refunds. The tables below providers the Board with statistics relating to all areas of pension administration workloads based on in department turnaround times. This is based on stats 1 April 2022 and 30 June 2022.

Benefit Administration – Priority areas

			Case Completion Statistics		
	Percentage achieved	*Previous percentage achieved*	Cases open at the beginning of the period	Total new cases created during the	Total cases completed during the
Retirements	98%	*98%*	311	894	900
Deaths	98%	*98%*	109	264	263
AVC's at Retirement	91%	*80%*	8	14	16
Refunds	98%	*98%*	111	991	952

Benefit Administration

	Percentage achieved	Previous percentage achieved	Case Completion Statistics		
			Cases open at the beginning of the period	Total new cases created during the period	Total cases completed during the period
Opt outs	97%	100%	5	164	141
Additional Contributions	100%	98%	12	99	103
Estimates	99%	98%	12	224	224
General query	99%	99%	90	419	408
Financial Advisor query	100%	95%	9	132	124
My Pension Online' query	100%	100%	0	21	21
Divorce	98%	100%	1	49	45
Transfers	97%	74%	124	344	363
Interfund Transfers	95%	95%	212	857	885
Aggregation	72%	62%	314	953	852
Complaints	90%	100%	3	15	18
Deferred Benefits	95%	94%	396	1328	1238
Change	100%	67%	4	131	131
New starter creation	99%	92%	24	1355	1313

To breakdown the change category, 18% relate to address changes, 70% to personal details changes and the remaining 12% 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

	Percentage achieved	Previous percentage achieved	Case Completion Statistics		
			Cases open at the beginning of the period	Total new cases created during the period	Total cases completed during the period
Payroll set-ups	96%	99%	20	1254	1255
Payroll queries/adjustments	94%	96%	19	798	779

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	113	48	52%
AVC at Retirement	6	3	50%
Divorce	8	0	N/A
Retirement	307	147	70%
Transfers in	42	17	50%
AVC/APC	16	11	50%
Aggregation	396	94	32%
Query	42	20	27%
Interfund Transfer in	229	70	45%
Quote	18	4	0%
Change	5	1	100%
Leaver	503	248	67%
Opt Out	62	39	24%
Refunds	150	79	60%
Starters	19	13	27%
Interfund Transfer out	28	21	38%
Transfers out	22	15	30%
Annual Allowance	4	1	0%
Payroll	141	7	50%
Year-End	718	0	N/A
TOTAL	**2829**	**838**	

Of the total overdue cases, 84% 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.

Other options considered

1.3   N/A

Legal and financial implications

1.4   N/A

Consultation and communication

1.5   N/A

Next steps and review

N/A

Background papers

N/A

Your questions and views (for key decisions)

If you have any questions about the matters contained in this report, please get in touch with the author of this report. If you have any views that you would like the cabinet member to consider please inform the democratic services team. This can be done by telephone [01296 382343] or email [democracy@buckinghamshire.gov.uk]