



Report to Pension Fund Board

Date: 19 October 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](#)

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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 July 2022 and 30 September 2022.

Type of incoming communication	Rec'd July-Sept 22	Rec'd April-June 22
Post	1,545	1,699
Pensions Inbox	6,081	5,518
Employers Inbox	389	647
Monthly Returns Inbox	89	85
'My Pension Online' registration/query Inbox	2,537	2,216
Document uploads via 'My Pension Online'	424	427
Telephone calls	3,234	3,559
Total Communications	14,299	14,151
<i>Ave. Daily Communications</i>	<i>220</i>	<i>236</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	97.41%	100%
Telephone calls	Ave queue time < 40 sec	17 sec	18 sec
	Ave calls answered > 97%	99.11 %	98.6%

*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	97.87%
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 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 July 2022 and 30 September 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%	305	888	911
Deaths	94%	98%	110	277	257
AVC's at Retirement	100%	91%	6	13	10
Refunds	97%	98%	150	887	861

Benefit Administration – Cases for period July – September 2022

	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	99%	97%	28	162	158
Additional Contributions	99%	100%	8	298	300
Estimates	98%	99%	12	263	268
General query	98%	99%	101	430	433
Financial Advisor query	100%	100%	17	131	134
My Pension Online' query	100%	100%	0	26	26
Divorce	95%	98%	5	61	60
Transfers	99%	97%	105	317	325
Interfund Transfers	95%	95%	184	940	873
Aggregation	89%	72%	415	1124	1217
Complaints	100%	90%	0	13	13
Deferred Benefits	95%	95%	486	1445	1210
Change	99%	100%	4	179	167
New starter creation	98%	99%	66	1311	1314

Payroll – Cases for period July – September 2022

	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	100%	96%	19	994	1019
Payroll queries/adjustments	97%	94%	38	588	631

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 September 2022, split by area of work & also cases overdue.

	Open cases	Percentage of cases overdue	Overdue cases external
Retirements	280	37%	89%
Deaths	136	35%	98%
AVC's at Retirement	10	50%	80%
Refunds	176	49%	93%
Opt outs	64	83%	98%
Additional Contributions	12	58%	100%
Estimates	13	0%	N/A
General query	31	55%	94%
Financial Advisor query	13	8%	100%
My Pension Online' query	0	N/A	N/A
Divorce	7	0%	N/A
Transfers	53	42%	86%
Interfund Transfers	279	41%	93%
Aggregation	158	42%	89%
Complaints	0	N/A	N/A
Deferred Benefits	736	42%	88%
Change	15	93%	93%
New starter creation	29	79%	65%
Payroll set-ups	66	5%	100%
Year-end	24	100%	100%
Annual Allowance	27	4%	0%

Of the total overdue cases, 80% 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. Of the overdue cases, just 16% are overdue by 3 months or more with the oldest

Projects

Annual Allowance

The deadline for providing a pension saving statement to all scheme members who had exceeded the Annual Allowance in the 2021/22 scheme year was 6 October 2022. The Benefit Administration team have now issued all statements, with the majority being published to 'my pension online' in the second half of September 2022. Following a bulk calculation on all active scheme member records, 158 individual cases were manually reviewed & 129 statements issued to scheme members who had exceeded.

Data Improvement

The team continues to work towards identifying and improving any data errors. The table below shows the increase in data scores since 2018. The main area requiring improvement is addresses held for deferred scheme members where we have a high number of 'gone away' addresses. We are currently working with a tracing company to trace & verify addresses for this group of scheme members.

	Common data score	Scheme specific data score
October 2018	91%	86%
December 2019	93%	95.1%
September 2020	95.1%	96%
October 2021	95.3%	97.86%
October 2022	96.2%	98.94%

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]

