



Report to Pension Fund Board

Date: 26 October 2023

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](#)

[Employer submissions/data reconciliation](#)

[Data Improvement](#)

[Scheme member movements](#)

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 2023 & 30 September 2023.

Type of incoming communication	Rec'd July – Sept 23	Rec'd Apr – Jun 23
Post	1,504	1,593
Pensions Inbox	7,631	5,801
Employers Inbox	574	541
Monthly Returns Inbox	56	76
'My Pension Online' registration/query Inbox	2,405	2,318
Document uploads via 'My Pension Online'	436	417
Document uploads via i-Connect	733	428
Telephone calls	2,980	3,224
Total Communications	16,319	14,398
<i>Ave. Daily Communications</i>	<i>251</i>	<i>240</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 which are all on target. A high number of calls are received daily which are answered by a team of 4 Member Liaison Officers. There is a target of 95% calls answered with an average queue time of less than 25 seconds. Over the second quarter of 2023/24, 98.67% of all calls received were answered with an average queue time of 19 seconds.

Workload/Performance Levels

Benefit Administration - Priority Areas

The team 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. These areas include retirements, deaths, AVC's at retirement and refunds. This target is to achieve a minimum of 95% of priority tasks completed within relevant turnaround times and this is reported on quarterly. The tables below show the achieved percentages for each quarter of 23/24 so far along with a breakdown for the last quarter showing volumes of work and individual areas of performance.

<i>Average over 2022/23</i>	<i>97.08%</i>
Quarter 1 2023/24	97.01%
Quarter 2 2023/24	95.00%
Quarter 3 2023/24	TBC
Quarter 4 2023/24	TBC

	Target	Percentage achieved	Previous percentage achieved	Case Completion Statistics		
				Cases open at the beginning of the period	cases created during the period	completed during the period
Retirements	95%	99%	98%	274	1102	1077
Deaths	95%	97%	97%	184	277	303
AVC's at Retirement	95%	77%	64%	13	16	13
Refunds	95%	90%	99%	88	1140	1145

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 2023 & 30 September 2023.

Benefit Administration

	Target	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	98%	100%	99%	73	508	531
Additional Contributions	98%	99%	98%	6	205	206
Estimates	95%	100%	100%	1	324	322
General query	95%	98%	100%	118	332	341
Financial Advisor query	98%	98%	99%	6	97	99
My Pension Online' query	98%	100%	100%	0	3	1
Divorce	98%	95%	96%	11	76	86
Transfers	95%	98%	97%	126	398	388
Interfund Transfers	90%	99%	99%	69	1353	1303
Aggregation	80%	99%	98%	96	903	884
Deferred Benefits	90%	96%	98%	290	797	891
Change	98%	99%	99%	25	394	384
New starter creation	98%	99%	94%	4	1337	1390
Complaints	90%	93%	100%	1	16	15
Tax	95%	100%	100%	0	178	176

Payroll

	Target	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	98%	97%	94%	8	990	997
Payroll queries/adjustments	96%	91%	93%	85	524	565

Open and overdue cases

In addition to reporting & reviewing turnaround statistics, we are also now reviewing the total open cases monthly to identify overdue cases and look at how these can be reduced. The table below provides details of the percentage of cases that are overdue for each work area as at the end of September 2023 & also provides a percentage of the overdue cases that are 'external' meaning the team are not in a position to process as they are waiting on information from an employer/scheme member.

	<i>Percentage of cases overdue</i>	Overdue cases external
Retirements	27%	90%
Deaths	50%	95%
AVC's at Retirement	19%	100%
Refunds	30%	92%
Opt outs	48%	85%
Additional Contributions	55%	67%
Estimates	0%	N/A
General query	54%	69%
Financial Advisor query	20%	100%
Divorce	0%	N/A
Transfers	28%	83%
Interfund Transfers	15%	89%
Aggregation	6%	100%
Deferred Benefits	53%	94%
Change	59%	94%
New starter creation	53%	88%
Payroll set-ups	35%	85%
Annual Allowance	0%	N/A

The team continually review the older overdue cases in order to try and resolve. In terms of length of time these cases have been overdue, as at 12 October 2023 there are 68 cases that were due for completion before 30 June 2023. Of these 68 cases, 60 are waiting for information from a scheme employer/scheme member/next of kin, 3 where information has been received within the last 2 days and 5 waiting to be checked and complete.



Employer submissions/data reconciliation

Employers are due to submit data via i-Connect by 19th of each month. Monitoring takes place monthly by the Employer Liaison Team to ensure submission. The aim is for 100% submission by the deadline however whilst i-Connect is still relatively new for some employers, the target is 95% with the intention of this increasing to 100%. The data below provides the current submission rates by the deadline.

Period submission received	By deadline
Quarter 1 2023/24	92%
Quarter 2 2023/24	93%
Quarter 3 2023/24	TBC
Quarter 4 2023/24	TBC

The table below provides a breakdown of the overdue submissions, by length of days overdue. Overall, this is 40 employer submissions that were after the deadline.

< 5 days	43%
5 to 10 days	20%
11 to 20 days	35%
21 to 30 days	0%
>30 days	2%

Following submission of data, reports are generated to identify any data suppressions or inconsistencies. Each of these are then reviewed and queried with the scheme employer where relevant. This is a newly introduced monthly reconciliation procedure that has been live since May 2022. Over quarter 2 of 2023/24, 1700 reconciliation reviews took place.

Data Improvement

The administration team continues to review data errors & inconsistencies within the pensions software system to improve data quality. This has been ongoing since 2018 and data quality continues to improve. The table below provides the scores since 2018 for both common & scheme specific data.

Common data is member specific so relates to data like national insurance numbers, addresses and dates of birth. Scheme specific data relates to member benefits such as transfers and payroll data.

	Common data score	Scheme specific data score
October 2018	91.00%	86.00%
December 2019	93.00%	95.10%
September 2020	95.10%	96.00%
October 2021	95.30%	97.86%
February 2022	96.00%	98.67%
November 2022	96.20%	98.98%
March 2023	96.80%	98.42%
June 2023	97.00%	98.91%
October 2023	97.10%	98.99%

The main area of data errors relates to deferred scheme member addresses. Bulk tracing takes place on an annual basis.

Scheme member movements

Due to the current financial situation, Board has asked for a report to keep track of member opt outs & 50/50 scheme elections. The tables below provide data for 2023/24 to date.

Opt outs

Quarter 1 2023/24	45
Quarter 2 2023/24	85
Quarter 3 2023/24	TBC
Quarter 4 2023/24	TBC

50/50 Scheme

	Main scheme to 50/50	50/50 to main scheme
Quarter 1 2023/24	25	3
Quarter 2 2023/24	16	0
Quarter 3 2023/24	TBC	TBC
Quarter 4 2023/24	TBC	TBC

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]

