



Report to Pension Fund Board

Date: 15 October 2024

Title: Administration Performance Statistics

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

Executive summary

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

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

[Incoming Communications](#)

[Workload/Performance Measures](#)

[Employer submissions/data reconciliation](#)

[Data Improvement](#)

[Projects](#)

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 2024 & 30 September 2024.

Type of incoming communication	Rec'd July – Sept 24	Rec'd Apr – June 24
Post	1,325	1,313
Pensions Inbox	4,590	5,426
Employers Inbox	175	579
Monthly Returns Inbox	50	27
'My Pension Online' registration/query Inbox	2,004	2,473
Document uploads via 'My Pension Online'	467	442
Document uploads via i-Connect	499	504
Telephone calls	2,903	3,912
Total Communications	12,013	14,676
<i>Ave. Daily Communications</i>	<i>185</i>	<i>237</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 2024/25, 99% of all calls received were answered with an average queue time of 16 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 24/25 so far along with a breakdown for the last quarter showing volumes of work and individual areas of performance.

<i>Average over 2023/24</i>	<i>97.31%</i>
Quarter 1 2024/25	97.83%
Quarter 2 2024/25	99.14%
Quarter 3 2024/25	TBC%
Quarter 4 2024/25	TBC%

				Case Completion Statistics			
	Target	Percentage achieved	Previous percentage achieved	Cases open at the beginning of the period	cases created during the period	completed during the period	%age of cases complete
Retirements	95%	99%	<i>99%</i>	227	1228	1220	84%
Deaths	95%	98%	<i>96%</i>	118	223	261	77%
AVC's at Retirement	95%	72%	<i>96%</i>	11	19	20	67%
Refunds	95%	100%	<i>100%</i>	124	1087	1045	86%

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 2024 & 30 September 2024.

Benefit Administration

				Case Completion Statistics			
	Target	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	%age of cases complete
Opt outs	98%	100%	100%	73	182	185	73%
Additional Contributions	98%	100%	99%	31	171	176	87%
Estimates	95%	99%	98%	31	285	304	96%
General query	95%	99%	100%	25	239	231	88%
Financial Advisor query	98%	100%	100%	8	132	133	95%
My Pension Online' query	98%	100%	100%	0	4	4	100%
Divorce	98%	97%	99%	2	77	74	94%
Transfers	95%	99%	99%	37	293	266	81%
Interfund Transfers	90%	98%	99%	273	1219	1133	76%
Aggregation	80%	100%	100%	58	596	584	89%
Deferred Benefits	90%	100%	99%	179	586	564	74%
Change	98%	100%	100%	11	155	156	94%
New starter creation	98%	96%	97%	78	265	228	66%
Complaints	90%	100%	100%	1	16	17	100%
Tax	95%	100%	98%	0	51	50	98%

Payroll

				Case Completion Statistics			
	Target	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	%age of cases complete
Payroll set-ups	98%	99%	95%	3	987	982	99%
Payroll queries/adjustments	96%	97%	93%	258	553	574	71%

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 2024 & 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. The table also now shows the same breakdown as at the end of June 2024 for comparison as well as the total number of open cases.

	Total open cases	As at 30/06/2024		As at 30/06/2024	
		Percentage of cases overdue	Overdue cases external	Percentage of cases overdue	Overdue cases external
Retirements	248	27%	92%	31%	81%
Deaths	92	46%	95%	38%	95%
AVC's at Retirement	13	23%	67%	7%	100%
Refunds	136	34%	89%	38%	95%
Opt outs	50	68%	91%	72%	100%
Additional Contributions	52	21%	82%	38%	70%
Estimates	13	8%	N/A	0%	N/A
General query	30	47%	100%	19%	100%
Financial Advisor query	6	0%	N/A	0%	N/A
Divorce	7	14%	N/A	0%	N/A
Transfers	61	28%	88%	23%	89%
Interfund Transfers	326	15%	92%	5%	100%
Aggregation	60	10%	100%	7%	100%
Deferred Benefits	167	57%	95%	53%	91%
Change	12	33%	100%	70%	100%
New starter creation	57	82%	81%	62%	83%

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 2024/25	93.21%
Quarter 2 2024/25	92.84%
Quarter 3 2024/25	TBC%
Quarter 4 2024/25	TBC%

The table below provides a breakdown of the overdue submissions, by length of days overdue. Overall, this is 39 employer submissions that were after the deadline.

< 5 days	44%
5 to 10 days	18%
11 to 20 days	13%
21 to 30 days	10%
>30 days	15%

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. Over the second quarter of 2024/25, 1,732 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%
November 2022	96.20%	98.98%
October 2023	97.10%	98.99%
October 2024	97.30%	99.24%

The main area of data errors relates to deferred scheme member addresses. An annual bulk tracing exercise is due to take place before the end of the year.

Projects

Annual Allowance

The deadline for providing a pension saving statement to all scheme members who had exceeded the Annual Allowance in the 2023/24 scheme year was 6 October 2024. The Benefit Administration team have now issued all statements, with the majority being published to 'my pension online' in the first half of September 2024. Following a bulk calculation on all active scheme member records, 38 individual cases were manually reviewed with just 8 scheme members exceeding & 19 statements issued.

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Other options considered

N/A

Legal and financial implications

N/A

Consultation and communication

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]

