

**Report to:** Pension Board

**Date of meeting:** 26 June 2017

**By:** Chief Operating Officer

**Title:** Officers' Report – Business Operations

**Purpose:** Update on current administration themes in relation to the service provided to the Pension Fund by Orbis Business Operations

---

## **RECOMMENDATIONS**

The Board is recommended to consider and note:

- 1) the Key Performance Indicator report for the period January to May 2017; and
  - 2) the update on progress of 2017 annual benefit statement exercise.
- 

### **1 Background**

1.1 Business Operations within Orbis has prepared this summary of topical administration areas that may be of interest to the Board. This report is provided for information and subjects are presented in alphabetical order and not perceived importance.

### **2 New Key Performance Indicators (KPIs)**

2.1 The Board and Committee previously agreed to Business Operations proposals for an updated set of Key Performance Indicators (KPIs) to provide full transparency of the scale of the scheme administration and to provide assurance of key standards and deadlines being met.

2.2 The new KPIs were operational from 1 October 2016 and **Appendix 1** shows the individual monthly performance levels for the period January to May 2017.

2.3 The performance levels of the team and the levels of customer satisfaction (captured from survey feedback) over this five month period are generally high, though the Board are invited to comment on any areas of concern. It should be noted that, with regard to sections 6(a) and (b) covering estimates, both employees and employers will be provided with an online facility from July 2017 to enable them to calculate their own estimates if they wish to do so. Members of the Business Operations team will be available to provide support to employees and employers who wish to use this online facility.

### **3 Year-end returns and Annual Benefit Statements 2017**

3.1 The statutory target date for production of Annual Benefit Statements (ABS's) is 31 August 2017 and production of the ABS's is dependent on accurate and timely submission of year end returns of pensionable pay and contributions data from employers in the East Sussex County Council fund.

3.2 Employers were provided with a target date of 30 April 2017 to submit year end returns. The majority of employers in the fund have submitted their returns for processing with a number of smaller employers (representing 3% of the active membership of the fund in total) still outstanding. Active engagement is taking place with these employers to complete their returns and ensure Business Operations is in a position to produce ABS's for all members.

3.3 The Board may recall that the intention is to produce ABS's online for 2017 rather than postal distribution and progress remains on track to ensure the statements will be available for viewing online by 31 August 2017.

#### **4 Personnel Update**

4.1 The Operations Manager for the Business Operations pensions team based in Lewes, Graham Devenish, has announced he will be retiring on 31 July 2017 after three years in the post. The team is currently enjoying a period of relative stability with no staff having left the organisation during 2016-17 and this should help to ensure minimal operational impact prior to a replacement being appointed.

**Kevin Foster**  
**Chief Operating Officer**

Contact Officer: Jason Bailey Tel. No. 020 8541 7473  
Email: [jason.bailey@surreycc.gov.uk](mailto:jason.bailey@surreycc.gov.uk)