These are Orbis internal targets and the ESCC targets agreed in Sept 20 as a result of Good Governance review cannot commence until April 21 or until we go live with a separate database.

East Sussex Pensions Administration - Key Performance Indicators

	Activity	Measure	Impact	Target	Oct-20		Sep-20		Aug-20		Jul-20		Jun-20		May-20		Apr-20		Mar-20		Feb-20	
	Scheme members	Pensioners, Active & Deferred			77,920		77,944		77,619		77,706		77,429		75,196		76,851		76,885		76,762	
	New starters set up				299		239		205		409		358		128		162		283		413	
					Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score
1a	Death notification acknowledged, recorded and documentation sent	within 5 days	M	95%	34	100%	29	100%	17	100%	35	100%	16	100%	33	100%	43	100%	21	100%	26	100%
1b	Award dependent benefits (Death Grants)	within 5 days	H	95%	18	100%	9	89%	8	100%	6	100%	12	100%	6	100%	4	100%	8	100%	7	100%
2a	Retirement notification acknowledged, recorded and documentation sent	within 5 days	M	95%	63	96%	52	97%	73	91%	74	92%	68	98%	46	98%	48	96%	94	99%	70	100%
2b	Payment of lump sum made	within 5 days	H	95%	140	94%	114	94%	127	94%	103	97%	82	97%	88	99%	121	97%	89	100%	75	99%
3	Calculation of spouses benefits	within 5 days	M	90%	23	100%	13	100%	10	100%	12	100%	16	100%	12	100%	16	100%	11	100%	20	100%
4a	Transfers In - Quote (Values)	within 10 days	L	90%	21	96%	37	100%	20	95%	12	92%	12	100%	19	95%	6	84%	21	100%	21	100%
4b	Transfers In - Payments	within 10 days	L	90%	22	100%	10	90%	15	60%	16	88%	12	100%	9	100%	20	95%	28	97%	39	100%
5a	Transfers Out - Quote	within 25 days	L	90%	33	100%	18	100%	41	91%	20	95%	16	100%	18	100%	18	100%	30	100%	33	97%
5b	Transfers Out - Payments	within 25 days	L	90%	11	100%	13	85%	8	100%	11	100%	7	86%	6	100%	11	100%	12	100%	24	96%
6a	Employer estimates provided	within 7 days	M	95%	10	100%	12	84%	54	73%	45	49%	25	72%	7	72%	11	91%	34	92%	24	100%
6b	Employee projections provided	within 10 days	L	95%	31	94%	19	79%	17	94%	18	84%	12	100%	5	100%	5	100%	22	91%	25	100%
7	Refunds	within 10 days	L	95%	39	100%	23	100%	32	100%	31	100%	38	98%	16	100%	12	100%	26	100%	39	100%
8	Deferred benefit notifications	within 25 days	L	95%	146	100%	122	100%	117	100%	160	100%	78	99%	102	100%	139	100%	202	100%	239	100%
	TOTAL TASKS COMPLETED				591	98.31%	494	95.34%	516	92.64%	543	92.63%	394		359		454		598		642	
	Missed target cases				10		23	5>3days	38		40											
9	Complaints received- Admin				2		0		6		0		1		0		1		0		0	
	Complaints received- Regulatory				0		0		0		0		0		0		0		0		0	
13	Compliments received						0		1		0		0		0		0		0		1	

OVERDUE CASES RED-AMBER

		Oct-20	Sep-20	Aug-20	Jul-20	Jun-20	May-20	Apr-20	Mar-20	Feb-20
1b	Award dependent benefits (Death Grants)		1 overdue - 2 days							
2a	Retirement notification acknowledged, recorded and documentation sent			7 overdue - average by 12 days	6 Overdue - Average 2 days		1 task overdue by 16 days			
2b	Payment of lump sum made	8 Overdue by average of 7 days		9 overdue - average by 3 days	9 Overdue - 1 by 348 days		1 task overdue by 17 days			1 case overdue by 10 days
3	Calculation of spouses benefits									
4a	Transfers In - Quote (Values)						1 task overdue by 1 day	1 case overdue 47 days		
4b	Transfers In - Payments			8 overdue - average by 32 days	3 Overdue - Average 9 days					
5a	Transfers Out - Quote									1 case overdue
5b	Transfers Out - Payments					1 Task, 5 Days overdue				1 case overdue
6a	Employer estimates provided		1 overdue - 7 days	15 overdue - average by 3 days	28 Overdue - Average 8 days	7 Tasks, 4 Days overdue average	2 tasks overdue by 2 days on average		3 tasks overdue on average by 1 day	
6b	Employee projections provided	2 Overdue by average of 6 days	4 overdue - average 2.5 days	1 overdue - by 37 days	5 Overdue - 1 by 73 days				2 tasks overdue by average of 2 days	
8	Deferred benefit (DB5YE)									1 case overdue

Summary for failed cases

Oct-20	Sep-20	Aug-20	Jul-20
Half the late lumpsums are where retirements returned paperwork early. Redundancy quotes stopped early October.	More intense training. TV in/out activity high. Projects - DIP, overseas mortality, ABS queries.	39 days holiday = 288 hours. Retirements & Employer estimates at high level. Training new starters.	Overall post up 38% on last month. Team encouraged to take leave.
		7/8 Aaron Martin left Mubu Mubukwanu joined	Job Robinson promoted	12/6 Simon Bathurst left	Will Bamber joined

Oct-20	Sep-20	Aug-20	Jul-20	Jun-20	May-20	Apr-20
Two vacancies	Two vacancies	Two vacancies	Two vacancies	Two vacancies	One vacancies	Two vacancies