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	Dec-20 Volume	Dec-20 Score	Nov-20 Volume	Nov-20 Score	Oct-20 Volume	Oct-20 Score	Sep-20 Volume	Sep-20 Score	Aug-20 Volume	Aug-20 Score	Jul-20 Volume	Jul-20 Score	Jun-20 Volume	Jun-20 Score	May-20 Volume	May-20 Score	Apr-20 Volume	Apr-20 Score	Mar-20 Volume	Mar-20 Score	Feb-20 Volume	Feb-20 Score	Total	Fails	% pass
	Scheme members	Pensioners, Active & Deferred			78448		78426		77,920		77,944		77,619		77,706		77,429		75,196		76,851		76,885		76,762				
	New starters set up				232		530		299		239		205		409		358		128		162		283		413				
1a	Death notification acknowledged, recorded and documentation sent	within 5 days	M	95%	20	100%	28	100%	34	100%	29	100%	17	100%	35	100%	16	100%	33	100%	43	100%	21	100%	26	100%	302	0	100
1b	Award dependent benefits (Death Grants)	within 5 days	H	95%	11	100%	7	86%	18	100%	9	89%	8	100%	6	100%	12	100%	6	100%	4	100%	8	100%	7	100%	96	2	97.9
2a	Retirement notification acknowledged, recorded and documentation sent	within 5 days	M	95%	43	94%	56	97%	63	96%	52	97%	73	91%	74	92%	68	98%	46	98%	48	96%	94	99%	70	100%	687	28	95.9
2b	Payment of lump sum made	within 5 days	H	95%	84	99%	85	97%	140	94%	114	94%	127	94%	103	97%	82	97%	88	99%	121	97%	89	100%	75	99%	1104	39	96.4
3	Calculation of spouses benefits	within 5 days	M	90%	8	100%	11	100%	23	100%	13	100%	10	100%	12	100%	16	100%	12	100%	16	100%	11	100%	20	100%	152	0	100
4a	Transfers In - Quote (Values)	within 10 days	L	90%	18	95%	17	100%	21	96%	37	100%	20	95%	12	92%	12	100%	19	95%	6	84%	21	100%	21	100%	204	7	96.6
4b	Transfers In - Payments	within 10 days	L	90%	5	100%	19	90%	22	100%	10	90%	15	60%	16	88%	12	100%	9	100%	20	95%	28	97%	39	100%	195	13	93.3
5a	Transfers Out - Quote	within 25 days	L	90%	22	96%	27	97%	33	100%	41	91%	18	100%	20	95%	16	100%	10	100%	18	100%	30	100%	33	97%	268	8	97
5b	Transfers Out - Payments	within 25 days	L	90%	8	100%	20	90%	11	100%	13	85%	8	100%	11	100%	7	86%	6	100%	11	100%	12	100%	24	96%	131	6	95.4
6a	Employer estimates provided	within 7 days	M	95%	9	89%	12	100%	10	100%	12	84%	54	73%	45	49%	25	72%	7	72%	11	91%	34	92%	24	100%	243	64	73.7
6b	Employee projections provided	within 10 days	L	95%	9	100%	22	96%	31	94%	19	79%	17	94%	18	84%	12	100%	5	100%	5	100%	22	91%	25	100%	185	12	93.5
7	Refunds	within 10 days	L	95%	21	100%	32	100%	39	100%	23	100%	32	100%	31	100%	38	98%	16	100%	12	100%	26	100%	39	100%	309	1	99.7
8	Deferred benefit notifications	within 25 days	L	95%	150	100%	150	98%	146	100%	122	100%	117	100%	160	100%	78	99%	102	100%	139	100%	202	100%	239	100%	1605	4	99.8
	TOTAL TASKS COMPLETED				408	98.28%	486	97.53%	591	98.31%	494	95.34%	516	92.64%	543	92.63%	394		359		454		598		642		5485	184	96.6
	Missed target cases				7		12		10		23 5>3days		38		40													
9	Complaints received- Admin				0		0		2		0		6		0		1		0		1		0		0				
	Complaints received- Regulatory				0		0		0		0		0		0		0		0		0		0		0				
13	Compliments received				0		0		0		0		1		0		0		0		0		0		1				

Performance Feb to Nov inclusive

OVERDUE CASES   RED-AMBER

		Dec-20	Nov-20	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 by 13 days		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 by 3 days		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

	Dec-20	Nov-20	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.

Summary for failed cases

Jan - new structure Chart	Dec-20	Nov-20	Oct-20	Sep-20	Aug-20	Jul-20	Jun-20	May-20	Apr-20	Mar-20
	Staff roles made permanent - Paul, Jennie, Julie & Joe				7/8 Aaron Martin left Mubu Mubukwanu joined	Job Robinson promoted	12/6 Simon Bathurst left	Will Bamber joined		
Ten vacancies	Two vacancies	Two vacancies	Two vacancies	Two vacancies	Two vacancies	Two vacancies	Two vacancies	One vacancies	Two vacancies	