

APPENDIX 1

These are Orbis internal targets and the ESCC targets agreed in Sept 20 as a result of Good Governance review cannot commence until we go live with a separate database (AH currently installing).

East Sussex Pensions Administration - Key Performance Indicators

	Activity	Measure	Impact	Target	Mar-21		Feb-21		Jan-21		Dec-20		Nov-20		Oct-20		Sep-20		Aug-20		Jul-20		Jun-20		May-20		Apr-20					
	Scheme members	Pensioners, Active & Deferred			79071		79027		78,990		78448		78426		77,920		77,944		77,619		77,706		77,429		75,196		76,851					
	New starters set up				211		211		176		232		530		299		239		205		409		358		128		162					
					Volume	Score	Volume	Score	Volume	Score	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%	43	100%	29	100%	64	100%	20	100%	28	100%	34	100%	29	100%	17	100%	35	100%	16	100%	33	100%	43	100%				
1b	Award dependent benefits (Death Grants)	within 5 days	H	95%	9	89%	10	100%	9	100%	11	100%	7	86%	18	100%	9	89%	8	100%	6	100%	12	100%	6	100%	4	100%				
2a	Retirement notification acknowledged, recorded and documentation sent	within 5 days	M	95%	84	95%	68	56%	74	94%	43	94%	56	97%	63	96%	52	97%	73	91%	74	92%	68	98%	46	98%	48	96%				
2b	Payment of lump sum made	within 5 days	H	95%	96	87%	99	94%	82	93%	84	99%	85	97%	140	94%	114	94%	127	94%	103	97%	82	97%	88	99%	121	97%				
3	Calculation of spouses benefits	within 5 days	M	90%	24	96%	19	100%	20	95%	8	100%	11	100%	23	100%	13	100%	10	100%	12	100%	16	100%	12	100%	16	100%				
4a	Transfers In - Quote (Values)	within 10 days	L	90%	19	79%	26	74%	23	61%	18	95%	17	100%	21	96%	37	100%	20	95%	12	92%	12	100%	19	95%	6	84%				
4b	Transfers In - Payments	within 10 days	L	90%	22	91%	17	95%	19	95%	5	100%	19	90%	22	100%	10	90%	15	60%	16	88%	12	100%	9	100%	20	95%				
5a	Transfers Out - Quote	within 25 days	L	90%	40	75%	41	93%	28	90%	22	96%	27	97%	33	100%	41	91%	18	100%	20	95%	16	100%	10	100%	18	100%				
5b	Transfers Out - Payments	within 25 days	L	90%	22	87%	12	92%	16	100%	8	100%	20	90%	11	100%	13	85%	8	100%	11	100%	7	86%	6	100%	11	100%				
6a	Employer estimates provided	within 7 days	M	95%	28	68%	30	80%	33	79%	9	89%	12	100%	10	100%	12	84%	54	73%	45	49%	25	72%	7	72%	11	91%				
6b	Employee projections provided	within 10 days	L	95%	14	93%	30	94%	9	100%	9	100%	22	96%	31	94%	19	79%	17	94%	18	84%	12	100%	5	100%	5	100%				
7	Refunds	within 10 days	L	95%	22	100%	24	100%	37	100%	21	100%	32	100%	39	100%	23	100%	32	100%	31	100%	38	98%	16	100%	12	100%				
8	Deferred benefit notifications	within 25 days	L	95%	127	100%	152	100%	203	100%	150	100%	150	98%	146	100%	122	100%	117	100%	160	100%	78	99%	102	100%	139	100%				
	TOTAL TASKS COMPLETED				550	91.45%	557	90.84%	617	93.70%	408	98.28%	486	97.53%	591	98.31%	494	95.34%	516	92.64%	543	92.63%	394	96.40%	359	98.30%	454	98.02%				
	Missed target cases				47		51		39		7		12		10		23	5>3days	38		40		14		6		9					
9	Complaints received- Admin										0		0		2		0		6		0		1		0		1					
	Complaints received- Regulatory										0		0		0		0		0		0		0		0		0					
13	Compliments received										0		0		0		0		1		0		0		0		0					
OVER DUE CASES RED-AMBER					Mar-21		Feb-21		Jan-21		Dec-20		Nov-20		Oct-20		Sep-20		Aug-20		Jul-20		Jun-20		May-20		Apr-20					
1b	Award dependent benefits (Death Grants)	Michael Keogh starts 8/4. Steve Plastow leaves 12/5. Lewis Leslie job offer made			1 Overdue by 2 days		30 overdue		4 overdue		1 Overdue by 13 days		1 overdue - 2 days		7 overdue - average by 12 days 6 Overdue - Average 2 days 1 task overdue by 16 days																	
2a	Retirement notification acknowledged, recorded and documentation sent				4 Overdue by average of 7 days				6 overdue																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	
2b	Payment of lump sum made				12 Overdue by average of 4 days				1 overdue																1 Overdue by 4 days		9 overdue - average of 7 days		9 overdue - average of 5 days		1 Task, 5 Days overdue	
3	Calculation of spouses benefits				1 Overdue by 4 days		7 overdue		9 overdue		2 Overdue by average of 17 days		1 overdue		8 overdue - average by 32 days		3 Overdue - Average 9 days		1 task overdue by 1 day		1 case overdue 47 days											
4a	Transfers In - Quote (Values)				4 Overdue by average of 7 days		1 overdue		3 overdue		10 Overdue by average of 15 days		9 Overdue by average of 5 days		4 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		4 overdue - average 2.5 days		1 overdue - by 37 days		5 Overdue - 1 by 73 days			
4b	Transfers In - Payments				2 Overdue by average of 17 days		3 overdue		9 Overdue by average of 5 days		1 overdue		4 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		4 overdue - average 2.5 days		1 overdue - by 37 days		5 Overdue - 1 by 73 days					
5a	Transfers Out - Quote				10 Overdue by average of 15 days		1 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		4 overdue - average 2.5 days		1 overdue - by 37 days		5 Overdue - 1 by 73 days					
5b	Transfers Out - Payments				9 Overdue by average of 5 days		1 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		4 overdue - average 2.5 days		1 overdue - by 37 days		5 Overdue - 1 by 73 days					
6a	Employer estimates provided				4 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		4 overdue - average 2.5 days		1 overdue - by 37 days		5 Overdue - 1 by 73 days					
6b	Employee projections provided				1 Overdue by 1 days		2 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		6 overdue		7 overdue		1 Overdue by 3 days		2 Overdue by average of 6 days		4 overdue - average 2.5 days		1 overdue - by 37 days		5 Overdue - 1 by 73 days					
8	Deferred benefit (DB5YE)	Summary for failed cases			Resources diverted to data migration to support UAT and Parallel runs.		Resources diverted to data migration to support UAT and Parallel runs.		Post received and tasks completed at highest levels in the last 12 months (up 50% on Dec 20). No. of deaths also very high.						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.											
									New structure chart showing new structure and agreed vacancies		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		Ten vacancies		Ten vacancies		Two vacancies		Two vacancies		Two vacancies		Two vacancies		Two vacancies		Two vacancies		Two vacancies		One vacancies		Two vacancies					

Michael Keogh starts 8/4. Steve Plastow leaves 12/5. Lewis Leslie job offer made

Performance for the year Apr 20 to Mar 21 inclusive		
Total	Fails	% pass
391	0	100
109	3	97.2
749	67	91.1
1221	62	94.9
184	2	98.9
230	26	88.7
186	16	91.4
314	16	94.9
145	9	93.8
276	73	73.6
191	14	92.7
327	1	99.7
1646	4	99.8
5969	293	95.1