APPENDIX 1

recorded and documentation sent
Payment of lump sum made
Calculation of spouses benefits
Transfers In - Quote (Values)
Transfers In - Payments
Transfers Out - Duote
Transfers Out - Duote
Transfers Out - Payments
Employer estimates provided
Employee projections provided
Refunds (inc frozen refunds wef Aug 22)
Deferred benefit (DBSYE)
Aggregation Quote
Aggregation Quote

East Sussex Pensions Administration - Key Perfor	rmance Indicators
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Activity	Impact	t	[since Oct 21]	Jun		Ma		Apr		Mai		Feb			ı-23	Dec		Nov		Oct		Sep		Aug		Jul	
Scheme members	Pensioners, Active & Deferred		83,939		83,857		83,910		84,074		84,394		84,232		84,0	84,067		83,333		83,208		82,472		82,526		82,476	
New starters set up	Bulk, i-Co	nnect & N	New Starter Task	35		3	32	31		40			30		73	1,0			19	38		29		21			30
				Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Scor
Death notification acknowledged,																											
recorded and documentation sent	M	95%	within 2 days	26	100%	26	100%	30	100%	28	100%	35	100%	48	100%	35	100%	47	100%	39	100%	25	100%	31	100%	26	10
Award dependent benefits (Death																											
Grants)	Н	95%	within 5 days	21	86%	8	100%	11	100%	25	100%	32	100%	29	100%	9	100%	22	100%	23	100%	11	100%	13	100%	14	10
Retirement notification acknowledged,																											
recorded and documentation sent	M	95%	within 7 days	121	99%	200	99%	137	98%	190	98%	203	99%	155		78	100%	91	100%	92	84%	100	92%	140	98%	148	9
Payment of lump sum made	Н	95%	within 5 days	133	99%	132	99%	145	98%	141	100%	115	100%	105	100%	73	100%	106	100%	128	100%	137	100%	150	100%	142	99
Calculation of spouses benefits	M	90%	within 5 days	14	100%	13	100%	14	100%	12	100%	26	100%	26	100%	14	100%	20	100%	18	100%	16	100%	25	100%	21	100
			within 10 dys,																								
Transfers In - Quote (Values)	L	90%	aggregation 15	47	98%	48	98%	33	91%	63	96%	48	98%	70	99%	45	94%	45	89%	41	93%	25	92%	42	88%	22	91
			within 5 dys,																								
Transfers In - Payments	L	90%	aggregation 25	20	100%	22	100%	21	100%	28	100%	19	100%	22	100%	23	100%	20	100%	18	100%	19	95%	22	100%	22	100
			within 10 dys,																								
Transfers Out - Quote	L	90%	aggregation 15	53	87%	29	73%	22	96%	65	97%	72	99%	76	100%	44	82%	61	90%	48	94%	54	86%	82	97%	36	97
			within 10 dys,																								
Transfers Out - Payments	L	90%	aggregation 25	12		19	85%	7	100%	40	98%	22		30		17	100%	26	85%	21	90%	18		10		21	91
Employer estimates provided	M	95%	within 15 days	27		21	100%	19	100%	17	100%	33	100%	13		8	100%	9	100%	10	100%	5	100%	4	100%	12	100
Employee projections provided	L	95%	within 15 days	21	100%	24	100%	15	100%	17	100%	17	100%	15	100%	7	100%	18	100%	21	100%	23	100%	16	94%	16	100
Refunds (inc frozen refunds wef Aug			Quotes 10 days,																								
22)	L	95%	settle 5 days	173		172	100%	132	97%	182	96%	125	86%	245	87%	110	98%	173	98%	165	89%	141	82%	160	89%	57	97
Deferred benefit notifications	L	95%	within 15 days	282		308	98%	257	97%	229	98%	203	99%	431	99%	235	99%	251	85%	339	98%	188	89%	213	93%	257	100
Aggregation Quote	M	95%	within 15 days	89		42	70%	62	81%	93	76%																
Aggregation Actual	М	95%	within 10 days	68		115	96%	324	98%	423	93%																
TOTAL TASKS COMPLETED				1,107	90.42%	1,179	96.70%	1,229		1,553	98.39%	950	97.47%	1,265		698	97.56%	889	93.81%	963		762		908	94.93%	794	97.98
Figures for the previous year				669	97.76%	806	98.01%	782	97.95%	844	96.68%	792		722		606	95.21%	883	97.62%	699	98.28%	847		789	98.61%	734	
Figures for two years ago				664	94.73%	643	96.89%	481	94.59%	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
Figures for three years ago				394	96.70%	359	98.61%	617	93.70%	598	99.00%	642	99.53%														
Missed target cases				106		39		38		76		24		41		17		55		49		75		46		16	
Complaints received				2		2		3		7		2		6		2		2		2		3		3		5	
Compliments received	1			0		0		0		1		1		0		1		0		0		0		0		0	
Summary for failed cases		Jun	Jun-23 May-23 Apr-23			-23	Mar-23 Feb-23 Jan-23 Dec-22					-22	Nov-22			Oct-22 Sep-22		-22	Aug-22		Jul-22						
Award dependent benefits (Death Grants)																											
Retirement notification acknowledged,				3 over by av	verage 6.67															15 over by a 2.87 days	-	8 over by av	verage 6.9				

Jun-23	May-23	Apr-23	Mar-23	Feb-23	Jan-23	Dec-22	Nov-22	Oct-22	Sep-22	Aug-22	Jul-22		
3 over by average 6.67 days								15 over by average 2.87 days	8 over by average 6.9 days				
							5 over by average 3 days			5 over by average 19 days			
7 over by average 6.43 days	8 over by average 4.25 days 3 over by average 4.33 days					8 over by average 5 days	4 over by average 21 days		8 over by average 5.3 days 9 over by average 4 days				
14 over by average 3.5	ĺ			18 over by average 1.2]		18 over by average	26 over by average 6	1 over by 10 days 17 over by average 5.4			
days 28 over by average 6.36 days				days	days	1	37 over by average 29 days	9.11 days	days 21 over by average 4 days	days 15 over by average 8.3 days			
30 over by average 38.42 days	13 over by average 48.05 days	12 over by average 8.08 days						=			<u>.</u>		
20 over by average 6.90 days	Altair Insights not cor	mpleted yet Racking	New KPI/SLA MI from	Altair Insights not cor	New KPI/SIA MI from	n Altair Insights not cor	nnleted yet Lots of	New KPI/SI A MI from	Altair Insights not con	nnleted yet Key			
on Aggregations bein once (plus creating &	g cleared and the BHC	C 2021/22 cases all at transfer process). GAD	Interviewing for Proje	ct Manager role in Jai ial Factor review. Mai	23. Process reviews	interviewing through	in Actail insignts for con oout the quarter. Proce s begin some intensive	ss reviews continue .	resources retained to work on ASS. 8-Connect Employers. Plus Julie full time on Annual Allowance in Sogn. Los of time consuming interviewing undertaken in August. In Sept two Staff begin working on Connect without BAU backfill. Als of team time being allocated to process reviews (the outstanding 2021/22 internal audit action). Sept included additional training for promoted staff. BAU time allocated to mortality exercises.				
Project Manager started 26/6			1 job advertised plus 1 new pensions administrator & 1 project officer started	1 new pension administrator & 1 i- Connect administrator started	1 job offer made & 1 casual project officer removed		5 roles advertised	3 new pension administrators + 1 apprentice started	3 existing pension administrators promoted and 1 changed roles - need to backfill.		8 vacancies advertised		
Two vacancies	Three vacancies	Three vacancies	Three vacancies	Five vacancies	Seven vacancies	Six vacancies	Six vacancies	Six vacancies	Ten vacancies	Ten vacancies	Ten vacancies		

Performance for the year
Apr 22 to Mar 23 inclusive

Fotal Fails % pass

1,835 3,193 12,297