APPENDIX 1

Fast Sussex Pensions Administration - Key Performance Indicators

	East Sussex Pensions Adm	ninistra	ation - K	ey Performa	nce Ind	licators							r																		
	Activity	Impac	t Target	Target	De	c-23	Nov	/-23	Oct	-23	Sep	b-23	Aug	g-23	Jul	-23	Jun	-23	May	-23	Apr-	23	Mar	-23	Feb	-23	Jan-	23	Performa		•
	Scheme members	Pensior	ners, Active	& Deferred	85	,239	85,	304	85,5	532	86,	016	86,0	J83	83,	923	83,9	939	83,8	357	83,9	10	84,0	74	84,3	394	84,2	32	Apr 22 to	Mar 23 iı	clusive
	New starters set up	Bulk, i-C	Connect & I	New Starter Task	2	293	4	37	55	6	2	52	2,1	.37	23	32	35	7	33	2	31:	L	402	2	53	0	37	3			
					Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Total Fa	ails	% pass
1a	Death notification acknowledged, recorded and documentation sent	м	95%	within 2 days	23		17	100%	29	100%	5 22	100%	23	100%	17	100%	26	100%	26	100%	30	100%	28	100%	35	100%	48	100%	324	0	100.
1b	Award dependent benefits (Death Grants)	н	95%	within 5 days	18	94%	3	100%	11	100%	9	100%	22	100%	18	100%	21	86%	8	100%	11	100%	25	100%	32	100%	29	100%	207	4	98.
	Retirement notification acknowledged, recorded and																														
22	documentation sent	м	95%	within 7 days	64	07%	73	000/	74	96%	60	92%	119	0.4%	98	91%	121	00%	200	0.0%	137	000/	190	0.00/	203	0.0%	155	99%	1,502	51	06
2a 2h	Payment of lump sum made			within 5 days	75		138		163	90%	68 60 169		119		98 155	91%	121	99%	132	99%	137	90%	190	90%	203 115		105	100%	1,502	16	90.
2b	Calculation of spouses benefits	M		within 5 days	/5	9070 1000/	120	99% 100%	105	1000/	109	99%	149			100%	135	100%	132	99% 100%	145	90%	141	100%	26		26	100%		10	99. 100
3		IVI	90%	-	2	100%	1	100%	3	100%	4	100%	4	100%	13	100%	14	100%	13	100%	14	100%	12	100%	26	100%	26	100%	132	0	100.
4a	Transfers In - Quote (Values)	L	90%	within 10 dys, aggregation 15	38	98%	26	100%	30	100%	46	98%	47	94%	28	97%	47	98%	48	98%	33	91%	63	96%	48	98%	70	99%	524	16	96.
4h	Transfers In - Payments	1		within 5 dys, aggregation 25	43	100%	49	98%	31	100%	27	100%	42	98%	29	100%	20	100%	22	100%	21	100%	28	100%	19	100%	22	100%	353	2	QQ
				within 10 dys,												10070				10070		10070		10070		10070				2	55.
5a	Transfers Out - Quote	L		aggregation 15 within 10 dys,	45	5 94%	51	100%	72	98%	58	99%	144	96%	134	98%	53	87%	29	73%	22	96%	65	97%	72	99%	76	100%	821	33	96.
5b	Transfers Out - Payments	L	90%	aggregation 25	14	72%	35	83%	31	94%	49	92%	49	74%	36	100%	12	100%	19	85%	7	100%	40	98%	22	100%	30	100%	344	33	90.
6a	Employer estimates provided	М	95%	within 15 days	12	2 100%	18	100%	17	100%	27	97%	24	100%	10	100%	27	100%	21	100%	19	100%	17	100%	33	100%	13	100%	238	1	99.
6b	Employee projections provided	L	95%	within 15 days	6	5 100%	24	100%	15	100%	5 17	100%	19	100%	9	100%	21	100%	24	100%	15	100%	17	100%	17	100%	15	100%	199	0	100.
7	Refunds (inc frozen refunds)	L	95%	Quotes 10 days, settle 5 days	202	2 95%	271	77%	178	79%	250	92%	160	84%	159	89%	173	92%	172	100%	132	97%	182	96%	125	86%	245	87%	2,249	257	88.
8	Deferred benefit notifications	L	95%	within 15 days	181	96%	475	85%	288	79%	293	91%	264	96%	250	95%	282	90%	308	98%	257	97%	229	98%	203	99%	431	99%	3,461	245	92.
9a	Aggregation Quote	М	95%	within 15 days	167	23%	140		113	49%	122	46%	76	69%	52	66%	89	66%	42	70%	62	81%	93	76%					956	483	49.
9b	Aggregation Actual	М	95%	within 10 days	117		332		559	74%	312		94		137	47%	68	70%	115	96%	324	98%	423	<mark>93%</mark>					2,481	556	77.
	TOTAL TASKS COMPLETED					81.03%		75.26%				86.90%		89.40%		87.95%		90.42%	_,_/ 3	96.70%	_,	96.90%		98.39%		97.47%		96.76%	15,411	1,697	89.
	Figures for the previous year					97.56%		93.81%				90.16%		94.93%				97.76%	806	98.01%		97.95%		96.68%		97.85%		98.34%			
	Figures for two years ago					95.21%		97.62%				97.17%		98.61%				94.73%				94.59%		91.45%		90.84%	617	93.70%			
	Figures for three years ago					98.28%		97.53%		98.31%		95.34%		92.64%		92.63%		96.70%		98.61%		93.70%		99.00%		<mark>99.53%</mark>					
	Missed target cases				191		409		312		193		131		138		106		39		38		76		24		41				
	Complaints received				3		3		1		1		6	<u>ا</u>	6		2		2		3		7		2		6				
11	Compliments received				0		0		0		0		0	l	0		0		0		0		1		1		0				
	Summary for failed cases	_			De	ec-23	Nov	/-23	Oct-	-23	Sep	o-23	Aug	-23	Jul		Jun-		May	-23	Apr-3	23	Mar-	23	Feb	-23	Jan-	23			
1b	Award dependent benefits (Death Grants)																3 over by av days	verage 6.67													
	acknowledged, recorded and	1					9 over by a	verage 5.6			6 over by	y average	8 over by a	verage 2.6	9 over by a				•												
2a	documentation sent						days						days		days																
2b	Payment of lump sum made																														
	Transfers Out - Quote																7 over by av days	verage 6.43	8 over by av days	erage 4.25											
54		-			4 over by	average 4	6 over by a	verage 1.8					13 over by	average	1				3 over by av	erage 4.33											
5b	Transfers Out - Payments				days		days						3.3 days						days												
	Refunds (inc frozen refunds wef Aug	1					63 over by	average	39 over by a	verage	22 over by	vaverage	26 over by	average	19 over by	average 7.4 1	14 over by a	average 3.5						[18 over by a	average 1.2	34 over by a	verage 2			

		_				7 over by average 6.43 days	8 over by average 4.25 days	
4 over by average 4 days	6 over by average 1.8 days			13 over by average 3.3 days			3 over by average 4.33 days	
	, .		22 over by average 8.9 days	26 over by average 3.2 days		14 over by average 3.5 days		-
	72 over by average 19.1 days	61 over by average 9.2 days	28 over by average 6.5 days			28 over by average 6.36 days		
129 over by average 90.7 days	, ,	, ,	67 over by average 117.9 days	24 over by average 78.5 days	, ,	30 over by average 38.42 days	13 over by average 48.05 days	12 over by average 8.08 days
33 over by average 52.2 days	147 over by average 10.4 days	, ,	61 over by average 4.5 days	36 over by average 8.5 days		20 over by average 6.90 days		

day of each month. More tasks received in bulk from BHCC and backdated pay. McCloud has complicated all post October 23 activity particulary transfers (widest sense). Deferred Benefit calcs New GAD Actuarial Factors in place. Resources re-deployed to are now performed by AI and the refunds will be live next quarter (UAT on live cases did impact KPI's). Project activity remains high and keeps coming, we are looking to re-prioritise and push some out

New KPI/SLA MI from Altair complete but need to be run on the last New KPI/SLA MI from Altair Insights not completed yet. Backlog on New KPI/SLA MI from Altair Insights not completed yet. Backlog on New KPI/SLA MI from Altair Insights not completed yet. Aggregations being cleared and the BHCC 2022/23 cases all at Aggregations being cleared and the BHCC 2021/22 cases all at once Interviewing for Project Manager role in Jan 23. Process reviews once. Next day transfer process live on 18/9/23 for all employers. (plus creating & testing new next day transfer process). GAD continue. GAD Actuarial Factor review. March was impacted by the Actuarial Factor review creating additional backlog Pension Increase exercise. work on i-Connect onboarding, ABS production, Annual Allowance projects.

			Advertise &	Project Officer	Promote Apprentice	Project Manager			1 job advertised plus 1	1 new pension	1 job offer made & 1
			Interview for 2	appointed (moved to	to Administrator 1/8	started 26/6			new pensions	administrator & 1 i-	casual project officer
	Two Apprentices		Apprentices. Looking	Projects from					administrator & 1	Connect administrator	removed
	joined 1/11 as did a		at a temp	Admin). Will Bamber					project officer started	started	
Pension Helpdesk	fixed term contractor		Administrator	left 18/8							
Officers.	for 3 months.			·							
One vacancy	One vacancy	Three vacancies	Three vacancies	Three vacancies	Two vacancies	Two vacancies	Three vacancies	Three vacancies	Three vacancies	Five vacancies	Seven vacancies

General comments

8 Deferred benefit (DB5YE)

9a Aggregation Quote

9b Aggregation Actual

7 22)

Staffing

18 over by average 1.2	34 over by average 2
days	days