

APPENDIX 1

East Sussex Pensions Administration - Key Performance Indicators

Activity	Impact	Target	Target	Mar-24	Feb-24	Jan-24	Dec-23	Nov-23	Oct-23	Sep-23	Aug-23	Jul-23	Jun-23	May-23	Apr-23													
Scheme members	Pensioners, Active & Deferred			85,398	85,452	85,519	85,239	85,304	85,532	86,016	86,083	83,923	83,939	83,857	83,910													
New starters set up	Bulk, i-Connect & New Starter Task			405	721	281	293	487	556	252	2,137	232	357	332	311													
				Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score													
1a	Death notification acknowledged, recorded and documentation sent	M	95%	within 2 days	19	100%	26	100%	27	100%	23	100%	17	100%	30	100%												
1b	Award dependent benefits (Death Grants)	H	95%	within 5 days	1	100%	2	100%	5	100%	18	94%	3	100%	11	100%												
2a	Retirement notification acknowledged, recorded and documentation sent	M	95%	within 7 days	216	94%	201	92%	220	96%	64	97%	73	88%	74	96%												
2b	Payment of lump sum made	H	95%	within 5 days	134	98%	100	99%	143	100%	75	98%	138	99%	163	99%												
3	Calculation of spouses benefits	M	90%	within 5 days	39	90%	22	87%	47	100%	2	100%	1	100%	3	100%												
4a	Transfers In - Quote (Values)	L	90%	within 10 dys, aggregation 15	24	100%	52	100%	40	85%	38	98%	26	100%	30	100%												
4b	Transfers In - Payments	L	90%	within 5 dys, aggregation 25	49	98%	46	100%	37	95%	43	100%	49	98%	31	100%												
5a	Transfers Out - Quote	L	90%	within 10 dys, aggregation 15	56	99%	83	91%	68	98%	45	94%	51	100%	72	98%												
5b	Transfers Out - Payments	L	90%	within 10 dys, aggregation 25	43	100%	40	98%	30	84%	14	72%	35	83%	31	94%												
6a	Employer estimates provided	M	95%	within 15 days	53	99%	64	100%	116	99%	12	100%	18	100%	17	100%												
6b	Employee projections provided	L	95%	within 15 days	21	96%	17	95%	10	100%	6	100%	24	100%	15	100%												
7	Refunds (inc frozen refunds)	L	95%	Quotes 10 days, settle 5 days	165	97%	158	99%	158	89%	202	95%	271	77%	178	79%												
8	Deferred benefit notifications	L	95%	within 15 days	225	99%	187	99%	276	99%	181	96%	475	85%	288	79%												
9a	Aggregation Quote	M	95%	within 15 days	133	34%	279	24%	327	19%	167	23%	140	22%	113	49%												
9b	Aggregation Actual	M	95%	within 10 days	219	84%	241	78%	232	71%	117	72%	332	56%	559	74%												
TOTAL TASKS COMPLETED				1,397	88.98%	1,518	80.24%	1,736	78.28%	1,007	81.03%	1,653	75.26%	1,614	80.67%	1,473	86.90%	1,236	89.40%	1,145	87.95%	1,107	90.42%	1,179	96.70%	1,229	96.90%	
Figures for the previous year				1,553	98.39%	950	97.47%	1,265	96.76%	698	97.56%	889	93.81%	963	94.91%	762	90.16%	908	94.93%	794	97.78%	669	97.76%	806	98.01%	782	97.95%	
Figures for two years ago				844	96.68%	792	97.85%	722	98.34%	606	95.21%	883	97.62%	699	98.28%	847	97.17%	789	98.61%	734	99.32%	664	94.73%	643	96.89%	481	94.59%	
Figures for three years ago				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	96.70%	359	98.61%	617	93.70%	
Figures for four years ago				598	99.00%	642	99.53%																					
Missed target cases				154		300		377		191		409		312		193		131		138		106		39		38		
10	Complaints received			2		3		1		3		1		6		6		6		6		2		2		3		
11	Compliments received			0		1		0		0		0		0		0		0		0		0		0		0		
Summary for failed cases				Mar-24	Feb-24	Jan-24	Dec-23	Nov-23	Oct-23	Sep-23	Aug-23	Jul-23	Jun-23	May-23	Apr-23													
1b	Award dependent benefits (Death Grants)													3 over by average 6.67 days														
2a	Retirement notification acknowledged, recorded and documentation sent	13 over by average 1.47		18 over by average 3 days					9 over by average 5.6 days		6 over by average 4.2 days		8 over by average 2.6 days		9 over by average 1.5 days													
2b	Payment of lump sum made																											
5a	Transfers Out - Quote													7 over by average 6.43 days		8 over by average 4.25 days												
5b	Transfers Out - Payments	5 over by average 1.8 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												
7	Refunds (inc frozen refunds wef Aug 22)	9 over by average 1.67 days				63 over by average 30.0 days		39 over by average 17.2 days		22 over by average 8.9 days		26 over by average 3.2 days		19 over by average 7.4 days		14 over by average 3.5 days												
8	Deferred benefit (DBSYE)					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												
9a	Aggregation Quote	88 over by average 46 days		212 over		265 over by average 70.56 days		129 over by average 90.7 days		110 over by average 105.9 days		58 over by average 105.1 days		67 over by average 117.9 days		24 over by average 78.5 days		18 over by average 21.7 days		30 over by average 38.42 days		13 over by average 48.05 days		12 over by average 8.08 days				
9b	Aggregation Actual	35 over by average 16.3 days		53 over		67 over by average 20.1 days		33 over by average 52.2 days		147 over by average 10.4 days		146 over by average 5.8 days		61 over by average 4.5 days		36 over by average 8.5 days		73 over by average 53.4 days		20 over by average 6.90 days								
General comments				KPI/SLA from Altair being presented. Whilst we have caught up on some on the post backlog some remains for combinings. The quarter priorities has been the data quality, GMP reconciliation & rectification, testing the Pension increases, MSS upgrade testing. March 24 saw 11 days of Altair down time (some just test).				New KPI/SLA MI from Altair complete but need to be run on the last day of each month. More tasks received in bulk from BHCC and backdated pay. McCloud has complicated all post October 23 activity particularly transfers (widest sense). Deferred Benefit calcs 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 a bit.				New KPI/SLA MI from Altair Insights not completed yet. Backlog on Aggregations being cleared and the BHCC 2022/23 cases all at once. Next day transfer process live on 18/9/23 for all employers. New GAD Actuarial Factors in place. Resources re-deployed to work on i-Connect onboarding, ABS production, Annual Allowance projects.				New KPI/SLA MI from Altair Insights not completed yet. Backlog on Aggregations being cleared and the BHCC 2021/22 cases all at once (plus creating & testing new next day transfer process). GAD Actuarial Factor review creating additional backlog												
Staffing				3 Pension Helpdesk Operators started on 4/3.		Fixed term contractor left & advertised for 2 Apprentices		Louis Marshall left		Advertised for 2 Pension Helpdesk Officers.		Two Apprentices joined 1/11 as did a fixed term contractor for 3 months.		Advertise & interview for 2 Apprentices. Looking at a temp Administrator		Project Officer appointed (moved to Projects from Admin). Will Bamber left 18/8		Promote Apprentice to Administrator 1/8		Project Manager started 26/6								
				Two vacancies		Five vacancies (inc helpdesk)		Four vacancies (inc helpdesk)		Three vacancies (inc helpdesk)		One vacancy		Three vacancies		Three vacancies		Three vacancies		Two vacancies		Two vacancies		Three vacancies		Three vacancies		

Performance for the year Apr 23 to Mar 24 inclusive		
Total	Fails	% pass
285	0	100.0
129	4	98.1
1,591	83	94.8
1,636	20	98.8
176	0	100.0
459	17	96.3
416	5	98.8
815	39	95.2
365	35	90.4
408	3	99.3
198	2	99.0
2,178	222	89.8
3,286	240	92.7
1,602	1,026	36.0
2,750	681	75.2
16,294	2,377	85.4

Item 9 was added in March 23 if excluded the performance for the year would be		
Jan-24	Feb-24	Mar-24
96.18%	96.49%	97.03%
Quarter		96.55%