

# Pensions – October 2015

## Critical Performance Monitoring

Item and target time		Target	Impact	May	June	July	Aug	Sep	Oct	Comments (Where target is Red)
Transfers/ Interfunds IN –	1. Full reconciliation of every suspense account within agreed timescales	100%	L	100%	100%	100%	100%	100%	100%	
	2. Calculation of spouses benefits within specification - 5 days	100%	M	83%	76%	80%	95%	73%	89%	Of 19 cases, 2 missed target by an average of 2.5 days
Transfers/ Interfunds Out	3. Deferred benefit notifications within specified timescales -25 days	100%	L	81%	88%	94%	81%	96%	90%	
	4a. Request values within specified timescales – 10dys	100%	L	97%	94%	94%	100%	100%	95%	
	4b. Request payment within specified timescales – 10 days	100%	L	100%	100%	100%	87%	100%	100%	
	5a. Provide quote within specified timescale - 10-25 days (ifo/tfr)	100%	L	97%	100%	100%	100%	96%	83%	Of 18 Interfund out cases, three missed target by an average of 10 days (target for interfund out is 10 days - )
	5b. Make payment within specified timescale – 5-25 days (ifo/tfr)	100%	L	60%	100%	100%	100%	91%	86%	Of 7 Interfund out cases, one missed target by 1 day
	6. Refunds - within specified timescales -10 days	100%	L	97%	100%	98%	100%	100%	100%	
	7a. Written complaints - acknowledged within 2 working days (2 days)	100%	H	1	2	0	1	0	0	
	7b. Written complaints - resolved and responded to within 5 working days (10 days for complex queries)	100%	H	1	1	0	1	0	0	
	8. Payslips despatched as per specification	100%	H	99.93 %	100%	100%	100%	100%	100%	
	9. Payroll accuracy - as specified	100%	H	100%	100%	100%	100%	100%	100%	
	10. Payment of lump sums within specification -7days	100%	M	82%	87%	92%	94%	92%	92%	
	11. Estimates provided within specified timescales – 7dys	100%	L	73%	79%	88%	95%	89%	87%	Of 174 cases, 22 missed target by 2.5 days

## Exception Commentary

Resource shortages continue impacting on results. Additional resignation received as a result of the upcoming relocation. Recruitment successful and 4 offers made and accepted (2 bank staff convert to perm and two new)

Key volume processes significantly higher than usual resulting from ESCC providing retrospective information for May-Oct 2015

Deferred Benefits backlog remains at 441 cases

## RAG Explanation

Green - 100% achievement

Amber - 90-99% Achievement

Red - Under 90% achievement

## Key Volume Processes From 1/10/15

Changes (addresses, hours, change personal details):

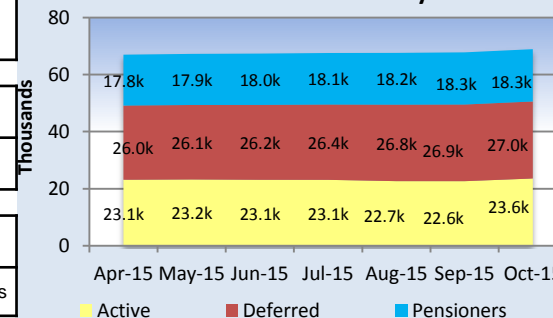
3,491 (YTD 5,513)

New Employers 1 (YTD 6)

Nominations 300 (YTD 1,099)

Starters : 1,090 (YTD 2,347)

## Number Of Pension Records By Status



# Pensions – November 2015

## Critical Performance Monitoring

Item and target time		Target	Impact	June	July	Aug	Sep	Oct	Nov	Comments (Where target is Red)
Transfers/ Interfunds IN –	1. Full reconciliation of every suspense account within agreed timescales	100%	L	100%	100%	100%	100%	100%	100%	
	2. Calculation of spouses benefits within specification - 5 days	100%	M	76%	80%	95%	73%	89%	100%	
	3. Deferred benefit notifications within specified timescales -25 days	100%	L	88%	94%	81%	96%	90%	97%	
Transfers/ Interfunds Out	4a. Request values within specified timescales – 10dys	100%	L	94%	94%	100%	100%	95%	93%	
	4b. Request payment within specified timescales – 10 days	100%	L	100%	100%	87%	100%	100%	100%	
	5a. Provide quote within specified timescale - 25 days	100%	L	100%	100%	100%	96%	83%	96%	
	5b. Make payment within specified timescale – 25 days	100%	L	100%	100%	100%	91%	86%	86%	
	6. Refunds - within specified timescales -10 days	100%	L	100%	98%	100%	100%	100%	95%	
	7a. Written complaints - acknowledged within 2 working days (2 days)	100%	H	2	0	1	0	0	0	
	7b. Written complaints - resolved and responded to within 5 working days (10 days for complex queries)	100%	H	1	0	1	0	0	0	
	8. Payslips despatched as per specification	100%	H	100%	100%	100%	100%	100%	100%	
	9. Payroll accuracy - as specified	100%	H	100%	100%	100%	100%	100%	100%	
	10. Payment of lump sums within specification -7days	100%	M	87%	92%	94%	92%	92%	95%	
	11. Estimates provided within specified timescales – 7dys	100%	L	79%	88%	95%	89%	87%	92%	

## Exception Commentary

### RAG Explanation

Green - 100% achievement

Amber - 90-99% Achievement

Red - Under 90% achievement

## Key Volume Processes From 1/11/15

Changes (addresses, hours, change personal details):

383 (YTD 5896)

New Employers

1 (YTD 7)

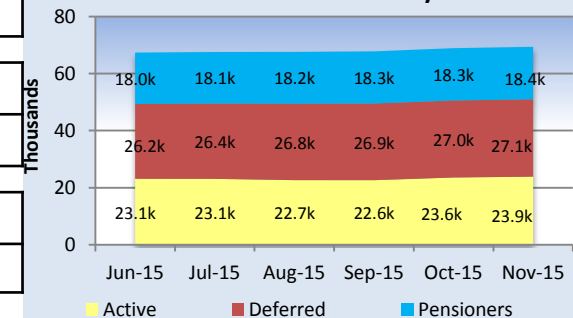
Nominations

166 (YTD 1265)

Starters :

601 (YTD 2948)

## Number Of Pension Records By Status



# Pensions – December 2015

## Critical Performance Monitoring

Item and target time		Target	Impact	July	Aug	Sep	Oct	Nov	Dec	Comments (Where target is Red)
Transfers/ Interfunds IN –	1. Full reconciliation of every suspense account within agreed timescales	100%	L	100%	100%	100%	100%	100%	100%	
	2. Calculation of spouses benefits within specification - 5 days	100%	M	80%	95%	73%	89%	100%	73%	Out of 11 Calculations performed, 8 were within timescale – 3 missed by an average of 3 days
Transfers/ Interfunds Out	3. Deferred benefit notifications within specified timescales -25 days	100%	L	94%	81%	96%	90%	97%	90%	
	4a. Request values within specified timescales – 10dys	100%	L	94%	100%	100%	95%	93%	98%	
	4b. Request payment within specified timescales – 10 days	100%	L	100%	87%	100%	100%	100%	100%	
	5a. Provide quote within specified timescale - 25 days	100%	L	100%	100%	96%	83%	96%	81%	Of 26 quotes , 21 were within target – 5 missed by an average of 4 days
	5b. Make payment within specified timescale – 25 days	100%	L	100%	100%	91%	86%	86%	83%	Of 12 quotes, 2 missed payment by an average of 1 day
	6. Refunds - within specified timescales -10 days	100%	L	98%	100%	100%	100%	95%	91%	
	7a. Written complaints - acknowledged within 2 working days (2 days)	100%	H	0	1	0	0	0	0	
	7b. Written complaints - resolved and responded to within 5 working days (10 days for complex queries)	100%	H	0	1	0	0	0	0	
	8. Payslips despatched as per specification	100%	H	100%	100%	100%	100%	100%	100%	
	9. Payroll accuracy - as specified	100%	H	100%	100%	100%	100%	100%	100%	
	10. Payment of lump sums within specification -7days	100%	M	92%	94%	92%	92%	95%	94%	
	11. Estimates provided within specified timescales – 7dys	100%	L	88%	95%	89%	87%	92%	93%	

## Exception Commentary

### RAG Explanation

Green - 100% achievement

Amber - 90-99% Achievement

Red - Under 90% achievement

In December 2015 we moved offices to County Hall, Lewes and were not 100% operational for 2 days.

The backlog of deferred benefits continue to remain at previously reported levels.

Staffing – We have had one retirement and two new starters for Jan 2016.

## Key Volume Processes From 1/12/15

Changes (addresses, hours, change personal details):

91 (YTD 5987)

New Employers 0 (YTD 7)

Nominations 96 (YTD 1351)

Starters : 79 (YTD 3037)

## Number Of Pension Records By Status

