

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	Sep-21	Aug-21	Jul-21	Jun-21	May-21	Apr-21	Mar-21	Feb-21	Jan-21	Dec-20	Nov-20	Oct-20														
Scheme members	Pensioners, Active & Deferred			79102	79,492	79,393	79,151	79,070	79,172	79,071	79,027	78,990	78,448	78,426	77,920														
New starters set up				240	200	287	230	326	178	211	211	176	232	530	299														
				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%	31	100%	15	100%	18	100%	16	100%	18	100%	22	100%	43	100%	29	100%	64	100%	20	100%	28	100%	34	100%	
1b	Award dependent benefits (Death Grants)	within 5 days	H	95%	16	100%	16	100%	8	100%	12	92%	21	96%	14	100%	9	89%	10	100%	9	100%	11	100%	7	86%	18	100%	
2a	Retirement notification acknowledged, recorded and documentation sent	within 5 days	M	95%	95	95%	117	96%	128	99%	94	99%	104	100%	81	91%	84	95%	68	56%	74	94%	43	94%	56	97%	63	96%	
2b	Payment of lump sum made	within 5 days	H	95%	147	90%	113	100%	107	100%	112	100%	147	97%	136	95%	96	87%	99	94%	82	93%	84	99%	85	97%	140	94%	
3	Calculation of spouses benefits	within 5 days	M	90%	22	96%	15	100%	14	93%	18	95%	16	100%	20	100%	24	96%	19	100%	20	95%	8	100%	11	100%	23	100%	
4a	Transfers In - Quote (Values)	within 10 days	L	90%	38	90%	35	89%	42	96%	47	73%	22	64%	12	67%	19	79%	26	74%	23	61%	18	95%	17	100%	21	96%	
4b	Transfers In - Payments	within 10 days	L	90%	22	91%	27	100%	23	100%	34	65%	8	75%	14	93%	22	91%	17	95%	19	95%	5	100%	19	90%	22	100%	
5a	Transfers Out - Quote	within 25 days	L	90%	43	91%	48	100%	103	100%	63	91%	47	98%	23	100%	40	75%	41	93%	28	90%	22	96%	27	97%	33	100%	
5b	Transfers Out - Payments	within 25 days	L	90%	17	95%	9	89%	8	100%	33	100%	9	100%	21	91%	22	87%	12	92%	16	100%	8	100%	20	90%	11	100%	
6a	Employer estimates provided	within 7 days	M	95%	19	100%	10	100%	26	97%	33	97%	42	96%	23	83%	28	68%	30	80%	33	79%	9	89%	12	100%	10	100%	
6b	Employee projections provided	within 10 days	L	95%	14	100%	19	95%	23	100%	19	95%	33	97%	8	88%	14	93%	30	94%	9	100%	9	100%	22	96%	31	94%	
7	Refunds	within 10 days	L	95%	54	100%	32	100%	32	100%	33	100%	29	97%	8	100%	22	100%	24	100%	37	100%	21	100%	32	100%	39	100%	
8	Deferred benefit notifications	within 25 days	L	95%	329	100%	333	100%	202	100%	150	100%	147	100%	99	99%	127	100%	152	100%	203	100%	150	100%	150	98%	146	100%	
TOTAL TASKS COMPLETED					847	97.17%	789	98.61%	734	99.32%	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%	
Figures for the previous year					494	95.34%	516	92.64%	543	92.63%	394	96.70%	359	98.61%	454	98.02%	598	99.00%	642	99.53%									
Missed target cases					24		11		5		35		20		26		47		51		39		7		12		10		
9	Complaints received- Admin			2		1		6		5		7		8		4		2		0		0		0		2		2	
	Complaints received- Regulatory			0		0		0		0		0		0		0		0		0		0		0		0		0	
13	Compliments received			1		0		0		1		1		0		0		0		0		0		0		0		0	

Performance for the year July 20 to June 21 inclusive		
Total	Fails	% pass
338	0	100
151	3	98.0
1007	64	93.6
1348	49	96.4
210	5	97.6
320	57	82.2
232	23	90.1
518	29	94.4
186	10	94.6
275	31	88.7
231	10	95.7
363	1	99.7
2188	2	99.9
7367	284	96.1

Summary for failed cases				Sep-21	Aug-21	Jul-21	Jun-21	May-21	Apr-21	Mar-21	Feb-21	Jan-21	Dec-20	Nov-20	Oct-20
1b	Award dependent benefits (Death Grants)						1 overdue				1 Overdue by 2 days			1 Overdue by 13 days	
2a	Retirement notification acknowledged, recorded and documentation sent									4 Overdue by average of 7 days	30 overdue	4 overdue			
2b	Payment of lump sum made		Switch to Admin2Pay module - immed paym't						7 overdue by average of 4 days	12 Overdue by average of 4 days	1 overdue	6 overdue		8 Overdue by average of 7 days	
3	Calculation of spouses benefits									1 Overdue by 4 days					
4a	Transfers In - Quote (Values)			5 overdue by average of 3 days			13 overdue	8 overdue by average of 23 days	4 overdue by average of 6 days	4 Overdue by average of 7 days	7 overdue	9 overdue			
4b	Transfers In - Payments						11 overdue	2 overdue by average of 38 days		2 Overdue by average of 17 days	1 overdue				
5a	Transfers Out - Quote									10 Overdue by average of 15 days	3 overdue				
5b	Transfers Out - Payments			1 overdue by 2 days						2 overdue by average of 10 days	9 Overdue by average of 5 days	1 overdue			
6a	Employer estimates provided								4 overdue by average of 6 days	4 Overdue by average of 6 days	6 overdue	7 overdue	1 Overdue by 3 days		
6b	Employee projections provided									1 Overdue by 1 days	2 overdue			2 Overdue by average of 6 days	
8	Deferred benefit (DB5YE)														

			Two issues with transfers-in: 1. PAT TUPE cases 2. Use of reply received task lists Both now resolved	Two bank holidays. Highest tasks completed since I started.	Blackout period closed 8/4/21.	Resources diverted to data migration to support UAT and Parallel runs. Blackout period commenced 20/3/21.	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 lump sums are where retirements returned paperwork early. Redundancy quotes stopped early October.
Adam Lansley contract made a seasonal worker 10/6/21.			Adam Lansley contract starts 10/6/21.	Steve Plastow retired 12/5/21. Lewis Leslie started 26/5/21.	Michael Keogh started 8/4/21.	Jennie Shuttleworth commenced maternity leave		New structure chart showing new structure and agreed vacancies	Staff roles made permanent - Paul, Jennie, Julie & Joe		
Eight vacancies	Eight vacancies	Eight vacancies	Eight vacancies	Nine vacancies	Nine vacancies	Ten vacancies	Ten vacancies	Ten vacancies	Two vacancies	Two vacancies	Two vacancies