APPENDIX 1

East Sussex Pensions Administration - Key Performance Indicators

Activity	Impact	Targe +	Target [since Oct 21]	Mar	-23	Feb	-23	Jan-	-23	Dec	-22	Nov	ı - 22	Oct	-22	Sep-	.22	Aug	-22	Jul-	.22	 Jun	-22	May	u-22	Δn	r-22
Scheme members	Pensioner	s Active	& Deferred	84,0	_	84,3		84,2		84,		83,3		83,2		82,4		82,5		82,4		82,5		81,4			450
New starters set up			lew Starter Task	40			30	37		1,0		51		38		29		21		43		39			16		87
ivew starters set up	buik, i co	inicct & iv	CW Starter rask	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume	Score	Volume		Volume	Score	Volume	Score	Volume	Score	Volume	Score
Death notification acknowledged,				Volume	30010	Volume	30016	Volume	30010	Volume	30010	Volume	30010	Volume	30010	Volume	30010	Volume	30010	Volume	Jeore	Volume	30010	Volume	30010	Volume	30010
1a recorded and documentation sent	M	95%	within 2 days	28	100%	35	100%	48	100%	35	100%	47	100%	39	100%	25	100%	31	100%	26	100%	39	100%	35	100%	23	100
Award dependent benefits (Death	101	33/0	within 2 days	20	10070	33	10070	70	100/0	33	10070	7/	10070	33	10070	2.5	10070	31	10070	20	10070	33	10070	33	10070		100
1b Grants)	Н	95%	within 5 days	25	100%	32	100%	29	100%	9	100%	22	100%	23	100%	11	100%	13	100%	14	100%	15	100%	12	100%	11	100
Retirement notification acknowledged 2a recorded and documentation sent 2b Payment of lump sum made	, М Н	95%	within 7 days within 5 days	190 141	98% 100%	203 115	100%	155 105	99% 100%	78 73		91 106	100%	92 128		100 137	92% 100%	140 150	98% 100%	148 142	95% 99%	78 134	100%	124 125	98%	96 142	100
3 Calculation of spouses benefits	M	90%	within 5 days	12	100%	26	100%	26	100%	14	100%	20	100%	18	100%	16	100%	25	100%	21	100%	17	100%	18	100%	17	100
4a Transfers In - Quote (Values)	L	90%	within 10 dys, aggregation 15 within 5 dys,	63	96%	48	98%	70	99%	45	94%	45	89%	41	93%	25	92%	42	88%	22	91%	24	80%	32	97%	33	85
4b Transfers In - Payments	L		aggregation 25 within 10 dys,	28	100%	19		22	100%	23		20		18	100%	19	95%	22	100%	22	100%	26	100%	38	100%	20	
5a Transfers Out - Quote	L		aggregation 15 within 10 dys,	65	97%	72	99%	76	100%	44	82%	61	90%	48	94%	54	86%	82	97%	36	97%	49	90%	50	96%	51	91
5b Transfers Out - Payments	L		aggregation 25	40	98%	22		30	100%	17	100%	26	85%	21	90%	18	50%	10	90%	21	91%	18	78%	26	77%	19	9!
6a Employer estimates provided	М	95%	within 15 days	17	100%	33	100%	13	100%	8	100%	9	100%	10	100%	5	100%	4	100%	12	100%	22	100%	23	100%	10	100
6b Employee projections provided	L	95%	within 15 days	17	100%	17	100%	15	100%	7	100%	18	100%	21	100%	23	100%	16	94%	16	100%	14	100%	13	100%	27	100
Refunds (inc frozen refunds wef Aug 7 22)	L		Quotes 10 days, settle 5 days	182	96%	125	86%	245	87%	110	98%	173	98%	165	89%	141	82%	160	89%	57	97%	31	100%	43	100%	39	100
8 Deferred benefit notifications	L	95%	within 15 days	229	98%	203	99%	431	99%	235		251	85%	339	98%	188	89%	213	93%	257	100%	202	100%	267	100%	294	
9a Aggregation Quote	М	95%	within 15 days	93	76%																						
9b Aggregation Actual	М	95%	within 10 days	423	93%																						
TOTAL TASKS COMPLETED				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	97.98%	669	97.76%	806	98.01%	782	97.95%
Figures for the previous year				844	96.68%	792	97.85%	722	98.34%	606	95.21%	883	97.62%	699	98.28%	847	97.17%		98.61%	734	99.32%	664	94.73%	643	96.89%	481	94.599
Figures for two 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%	454	98.029
Figures for three years ago				598	99.00%	642	99.53%																				
Missed target cases				76		24		41		17		55		49		75		46		16		15		16		16	
10 Complaints received				7		2		6		2		2		2		3		3		5		2		6		5	
11 Compliments received				1		1		0		1		0		0		0		0		0		1		1		0	
Summary for failed cases				Mar	-23	Feb	-23	Jan-	-23	Dec	:-22	Nov	·-22	Oct	-22	Sep-	22	Aug	-22	Jul-	22	Jun-	-22	May	y-22	Ар	r-22

Performance for the year Apr 22 to Mar 23 inclusive										
Total	Fails		% pass							
41	1	0	100.0							
21	6	0	100.0							
1,49		51	96.6							
1,49	8	4	99.7							
23	0	0	100.0							
49	0	46	90.6							
27	7	2	99.3							
68	8	43	93.8							
26	8	31	88.4							
16	6	0	100.0							
20	4	1	99.5							
1,47	1	128	91.3							
3,10	9	95	96.9							
9	3	22	76.3							
42	3	29	93.1							
11,03	9	452	95.9							

	Julillary for failed cases
1b	Award dependent benefits (Death Grants)
2a	Retirement notification acknowledged, recorded and documentation sent
2b	Payment of lump sum made
3	Calculation of spouses benefits
4a	Transfers In - Quote (Values)
4b	Transfers In - Payments
5a	Transfers Out - Quote
5b	Transfers Out - Payments
6a	Employer estimates provided
6b	Employee projections provided
7	Refunds (inc frozen refunds wef Aug 22)
8	Deferred benefit (DB5YE)

5 over by average 3 days		5 over by average 19 days		5 over by average 6 days		5 overby average days
1	0 avanhu avana 5 2	l				
	8 over by average 5.3 days		,		Г	1
4 over by average 21	9 over by average 4			4 over by average 6	6 over by average 1.6	

				1 over by 10 days
1.8 over by average 1.2 days 34 over by average 2		18 over by average 9.11 days	26 over by average 6 days	17 over by average 5.4 days
	37 over by average 29 days		21 over by average 4 days	15 over by average 8.3 days

8 over by average 5

				days		days	days				
-	n Altair Insights not co ect Manager role in Ja	nn 23. Process reviews	interviewing through	· ·	ess reviews continue .	begin working on i-Co time being allocated 2021/22 internal aud	o work on ABS & i-Con Annual Allowance in ing undertaken in Augonnect without BAU beto process reviews (the	onnect Employers. In Sept. Lots of time gust. In Sept two staff backfill. A lot of team he outstanding ed additional training	yet. Key resource BHCC i-Connect	orting MI from Altair In	•
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	3 job offers made	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			Mike Keogh left 14/4/22. Jennie went p/t 3 days a week
Three vacancies	Five vacancies	Seven vacancies	Six vacancies	Six vacancies	Six vacancies	Ten vacancies	Ten vacancies	Ten vacancies	Ten vacancies	Ten vacancies	Ten vacancies

15 over by average

8 over by average 6.9