

APPENDIX 1

East Sussex Pensions Administration - Key Performance Indicators

Activity	Impact	Target	Target	Dec-23		Nov-23		Oct-23		Sep-23		Aug-23		Jul-23		Jun-23		May-23		Apr-23		Mar-23		Feb-23		Jan-23		Performance for the period Apr 22 to Mar 23 inclusive		
				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	Fails	
Scheme members	Pensioners, Active & Deferred			85,239		85,304		85,532		86,016		86,083		83,923		83,939		83,857		83,910		84,074		84,394		84,232				
New starters set up	Bulk, i-Connect & New Starter Task			293		487		556		252		2,137		232		357		332		311		402		530		373				
1a	Death notification acknowledged, recorded and documentation sent	M	95%	within 2 days	23	100%	17	100%	29	100%	22	100%	23	100%	17	100%	26	100%	26	100%	30	100%	28	100%	35	100%	48	100%	324	0
1b	Award dependent benefits (Death Grants)	H	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
2a	Retirement notification acknowledged, recorded and documentation sent	M	95%	within 7 days	64	97%	73	88%	74	96%	68	92%	119	94%	98	91%	121	99%	200	99%	137	98%	190	98%	203	99%	155	99%	1,502	51
2b	Payment of lump sum made	H	95%	within 5 days	75	98%	138	99%	163	99%	169	99%	149	98%	155	99%	133	99%	132	99%	145	98%	141	100%	115	100%	105	100%	1,620	16
3	Calculation of spouses benefits	M	90%	within 5 days	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
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
4b	Transfers In - Payments	L	90%	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
5a	Transfers Out - Quote	L	90%	within 10 dys, aggregation 15	45	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
5b	Transfers Out - Payments	L	90%	within 10 dys, 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
6a	Employer estimates provided	M	95%	within 15 days	12	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
6b	Employee projections provided	L	95%	within 15 days	6	100%	24	100%	15	100%	17	100%	19	100%	9	100%	21	100%	24	100%	15	100%	17	100%	17	100%	15	100%	199	0
7	Refunds (inc frozen refunds)	L	95%	within 10 days, settle 5 days	202	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
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
9a	Aggregation Quote	M	95%	within 15 days	167	23%	140	22%	113	49%	122	46%	76	69%	52	66%	89	66%	42	70%	62	81%	93	76%					956	483
9b	Aggregation Actual	M	95%	within 10 days	117	72%	332	56%	559	74%	312	81%	94	62%	137	47%	68	70%	115	96%	324	98%	423	93%					2,481	556
TOTAL TASKS COMPLETED				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%	1,553	98.39%	950	97.47%	1,265	96.76%	15,411	1,697	
Figures for the previous year				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%	844	96.68%	792	97.85%	722	98.34%			
Figures for two years ago				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%	550	91.45%	557	90.84%	617	93.70%			
Figures for three years ago				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%	598	99.00%	642	99.53%					
Missed target cases				191		409		312		193		131		138		106		39		38		76		24		41				
10	Complaints received				3		3		1		1		6		6		2		2		3		7		2		6			
11	Compliments received				0		0		0		0		0		0		0		0		1		1		0					

Summary for failed cases

	Dec-23	Nov-23	Oct-23	Sep-23	Aug-23	Jul-23	Jun-23	May-23	Apr-23	Mar-23	Feb-23	Jan-23				
1b	Award dependent benefits (Death Grants)							3 over by average 6.67 days								
2a	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	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	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		18 over by average 1.2 days	34 over by average 2 days		
8	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	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	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

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

New KPI/SLA MI from Altair Insights not completed yet. Interviewing for Project Manager role in Jan 23. Process reviews continue. GAD Actuarial Factor review. March was impacted by the Pension Increase exercise.

Staffing

Advertised for two 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			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
One vacancy	One vacancy	Three vacancies	Three vacancies	Three vacancies	Two vacancies	Two vacancies	Three vacancies	Three vacancies	Three vacancies	Five vacancies	Seven vacancies

Year	% pass
2017	100.0
2018	98.1
2019	96.6
2020	99.0
2021	100.0
2022	96.9
2023	99.4
2024	96.0
2025	90.4
2026	99.6
2027	100.0
2028	88.6
2029	92.9
2030	49.5
2031	77.6
2032	89.0

