

Bath & North East Somerset Council	
MEETING:	LOCAL PENSION BOARD
MEETING DATE:	24 May 2018
TITLE:	PENSION FUND ADMINISTRATION PERFORMANCE AGAINST LEGAL STATUTORY DEADLINES SUMMARY PERFORMANCE REPORT
WARD:	ALL
AN OPEN PUBLIC ITEM	
List of attachments to this report: Appendix 1 – Legal Requirement Reporting Schedule Appendix 2 – Cases completed during period ending 31 st March 2018	

1 THE ISSUE

- 1.1 The Board had requested the Fund to provide a comparative report to reflect current APF SLA benchmarking targets already reported against published legal statutory deadlines.
- 1.2 The purpose of this report is to inform the Pension Board of performance figures for Fund Administration measured against these timescales for the three months to 31st March 2018.

2 RECOMMENDATION

The Board is asked to note:

- 2.1 Avon Pension Fund performance to 31st March 2018 with regard to published legal statutory deadlines.

3 LEGAL REQUIREMENT REPORTING

- 3.1 The information provided in this report is based on Avon Pension Fund's performance against regulatory requirements as set out in The Occupational & Personal pension Scheme (Disclosure of Information) Regulations (as amended) and the Occupational Pension Schemes (Transfer Values) regulations 1996, which require provision of information to members.
- 3.2 As recommended by the Pension Board in November 2017, a new suite of reporting has been developed to report on the Fund's performance against legal statutory deadlines.
- 3.3 Whilst initial reports have been developed to enable reporting to be produced for the last quarter (1st January to 31st March), further development is necessary

going forward to increase the number of reportable cases the new reporting is able to pick up. This will require extending the date range of the reporting period and is required as the legal requirements in some categories give a measurement period of up to 138 days (6 months) to complete a case compared to the funds existing SLA which gives a period of up to 30 days (1 month).

- 3.4 The additional reporting against legal statutory deadlines has required a significant amount of development time for officers across both the APF's Member Services section and B&NES Council's Financial Systems team. Without the bespoke development of workflow, which was carried out internally as part of the 2015 Pensions Admin Strategy, which enhanced the level of reporting available, it would not have been possible to report on the legal requirements as such reporting is not readily available as part of the software systems reporting capabilities.

4 APF PERFORMANCE

- 4.1 Attached Appendix 2 measures APF disclosure performance against statutory legal deadlines as outlined in Appendix 1.

5 EQUALITIES

- 5.1 No items in this report give rise to the need to have an equalities impact assessment

6 CONSULTATION

- 6.1 None appropriate

7 ISSUES TO CONSIDER IN REACHING THE DECISION(S)

- 7.1 There are no issues to consider not mentioned in this report.

8 ADVICE SOUGHT

- 8.1 The Council's Monitoring Officer (Divisional Director – Legal & Democratic Services) and Section 151 Officer (Divisional Director - Business Support) have had the opportunity to input to this report and have cleared it for publication.

Contact person	<i>Geoff Cleak, Pensions Manager, Tel 01225 395277</i>
Background papers	<i>Various statistical documents.</i>
Please contact the report author if you need to access this report in an alternative format	