

Administration Service Improvement Plan update Q3 2023



Current service state

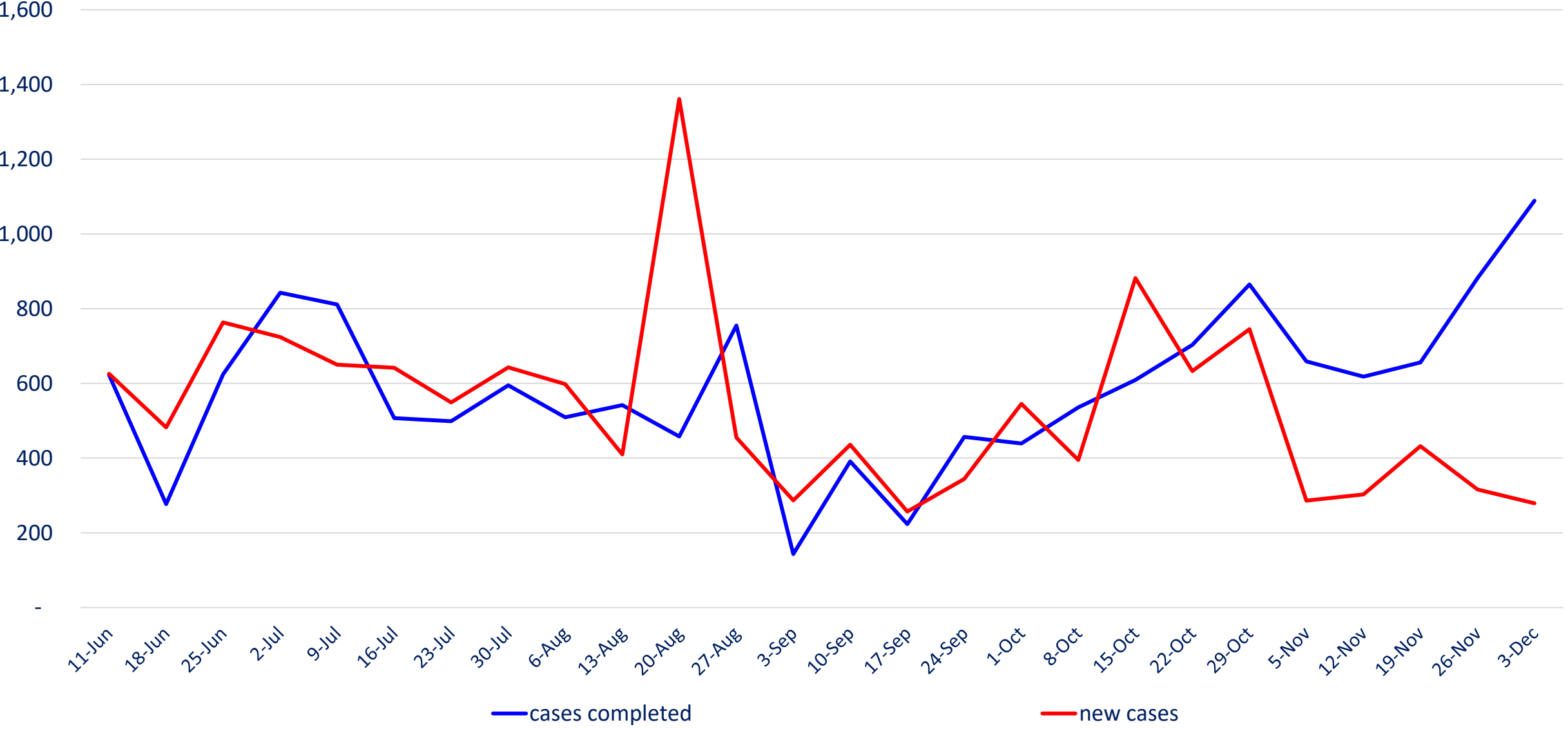
The Data

Aggregate performance is broadly stable – but insufficient

	25-Jun	2-Jul	9-Jul	16-Jul	23-Jul	30-Jul	6-Aug	13-Aug	20-Aug	27-Aug	3-Sep	10-Sep	17-Sep	24-Sep	1-Oct	8-Oct	15-Oct	22-Oct	29-Oct	5-Nov	12-Nov	19-Nov	26-Nov	
Death Notification	0%	0%	6%	0%	29%	92%	44%	55%	90%	47%	71%	64%	100%	36%	75%	88%	73%	69%	67%	42%	41%	94%	78%	
Death - Payment	60%	50%	78%		67%	75%	67%	100%	100%	80%	0%	50%	88%	52%	78%	67%	47%	92%	100%	86%	100%	69%	60%	
Retirement (Active) - Quote	53%	57%	59%	64%	91%	92%	9%	46%	53%	41%	40%	33%	32%	44%	52%	19%	27%	26%	26%	23%	23%	28%	26%	
Retirement (Active) - Actual	67%	69%	89%	92%	93%	86%	64%	43%	67%	65%	100%	100%	75%	89%	61%	60%	64%	76%	77%	83%	59%	56%	96%	
Divorce - Quote		100%	58%	70%	100%	83%	100%		100%		100%		100%	75%	100%	100%		100%	100%	100%		0%	100%	
Divorce - Actual			0%														100%							
Refund - Quotes		0%	20%	50%	0%	48%	56%	13%	0%	26%	33%	3%	22%	41%	0%	1%	10%	10%	6%	25%	40%	32%	7%	
Refund - Actual	100%	0%	38%	39%		0%	100%	20%	29%	100%	100%	86%	100%	70%	50%	69%	88%	55%	100%	100%	78%	96%	100%	
Deferred Benefits	60%	95%	84%	46%	65%	69%	85%	40%	62%	69%	60%	40%	60%	16%	74%	34%	19%	34%	10%	75%	100%	43%	75%	
Transfer In - Quote			100%		0%				0%	13%	100%	100%	0%	0%	0%			0%		0%	0%	0%	0%	38%
Transfer In - Actual			100%			0%	100%	0%	25%	100%	100%		100%	0%	20%	0%	0%	50%		100%	0%	17%	100%	
Transfer Out - Quote		100%	17%	43%	0%	68%	65%	70%	27%	0%	0%		0%		0%	25%	0%	33%	50%	17%	0%	0%	0%	
Transfer Out - Actual		100%		0%		33%	33%	50%	0%	75%			0%	0%	60%	100%		0%	60%	100%	75%	100%	100%	
Employer Estimate - Quote	56%		100%	0%	100%				100%			100%	100%	38%	0%	100%	0%	100%	100%	78%		83%	0%	
Member Estimate - Quote	46%	95%	100%	100%	100%	100%	100%	100%		93%	71%	100%	78%	75%	75%	93%	57%	100%	90%	93%	100%	100%	75%	
Joiner	50%	99%	99%	96%	99%	99%	99%	100%	97%	99%	97%	99%	94%	100%	97%	91%	90%	100%	99%	100%	100%	100%	98%	
Weighted Average	55%	69%	65%	56%	64%	68%	75%	59%	54%	57%	63%	68%	61%	45%	50%	61%	46%	58%	68%	67%	56%	54%	62%	

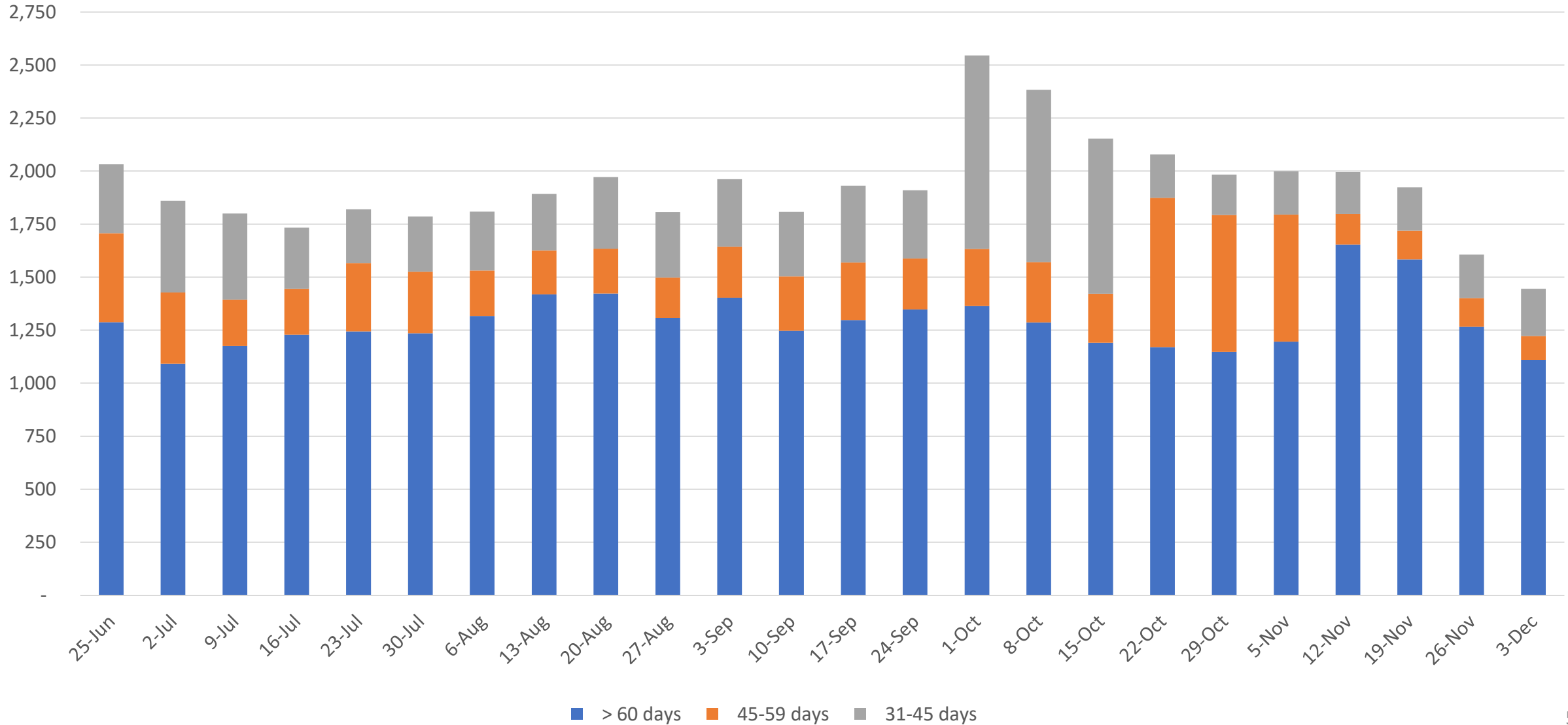
Cases completed are starting to exceed new cases coming in

New Cases vs Cases Completed



With consequent decline in outstanding cases

Outstanding Cases by age of case



Greatest decline in 'older' outstanding cases

typically not captured by quarterly performance reporting

	days since case created								
	0-5	6-10	11-15	16-20	21-25	26-30	31-45	46-59	60+
Death Notification	▼ 10	▲ 4		▲ 1		▼ 1			▼ 1
Death - Act/Def/Pen - Payment	▲ 14	▲ 5	▲ 3	▲ 1	▼ 1	▼ 1		▼ 1	▼ 4
Retirement (Active) - Quote	▲ 11	▼ 3	▲ 19	▲ 33	▲ 20	▲ 19	▲ 77	▲ 10	▲ 38
Retirement (Active) - Actual	▲ 13		▲ 2	▼ 3	▼ 2	▼ 6	▼ 19	▼ 5	▼ 90
Retirement (Deferred) - Quote									
Retirement (Deferred) - Actual	▲ 47	▲ 11		▲ 1	▼ 1		▼ 5	▼ 1	▼ 2
Divorce - Quote	▲ 3	▼ 2	▲ 7	▲ 2	▼ 8	▲ 3	▼ 2	▼ 5	
Divorce - Actual									▼ 5
Refund - Quotes	▲ 9	▼ 17	▼ 69	▼ 5	▼ 19	▼ 89	▼ 125	▼ 149	▲ 56
Refund - Actual	▲ 16	▲ 11	▲ 14	▲ 85	▼ 3	▼ 4	▼ 7	▼ 23	▼ 17
Deferred Benefits	▼ 53	▼ 7	▼ 43	▲ 40	▲ 5	▲ 52	▼ 12	▼ 33	▲ 66
Transfer In (Active) - Quote		▼ 1	▲ 19	▼ 3	▼ 2	▼ 7	▼ 8	▼ 46	▼ 172
Transfer In (Active) - Actual	▲ 7	▲ 1	▲ 1				▲ 1		▼ 7
Transfer Out - Quote	▲ 5	▲ 12	▲ 7	▲ 4		▼ 14	▼ 8	▼ 39	▼ 72
Transfer Out - Actual	▲ 2				▼ 1			▼ 2	▼ 2
Employer Estimate - Quote	▼ 5	▼ 2	▼ 3	▼ 1		▼ 1			▼ 1
Member Estimate - Quote		▼ 4	▼ 5			▲ 1	▲ 1	▲ 1	▼ 1
Joiner	▼ 288	▲ 50	▼ 55	▲ 8	▼ 15	▼ 53	▲ 4	▼ 13	▲ 36

Total	▼ 229	▲ 58	▼ 103	▲ 163	▼ 27	▼ 101	▼ 103	▼ 306	▼ 178
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Root causes affecting service



People & Capacity



Processes




Regulatory
Changes



Spikes in work and
project support



Increased demand



People &
Capacity

Root Cause

Vacancy rate high – 10% (down from 15%)

Improvement actions

- 13 appointments made
- Digital Services Manager appointed
- Payroll staff appointed
- 7 ongoing campaigns
- Controlling internal movement of staff
- New Payroll structure agreed

Pay

- NJC Pay award
- Market Supplement appears to support stabilisation and attracting new candidates

Officer experience

- Ongoing training & development



Processes

Root Cause

Duplication of process and checking

Improvement actions

- Started process review – duplications removed
- Guidance and training given
- Assurances on data and calculation engine given

Volume of Leaver work

- Implemented automated case allocation to buckets
- Reviewing tolerances and checks for refunds (reduced for refunds <£100)

Payroll processes

- Bank Account Validation in testing
- Mortality screening in testing
- New tasks to track pensioner deaths



Root cause

Improvement actions

New McCloud regulations wef 1st October

- Data collection project (2000 to date)
- System updates tested
- Switched on in Live
- Training for officers
- Process & Letter review
- Compliance with disclosure regulations
- Attending webinars & POG's
- Working within regs from 1st October

New Fire Scheme Sergeant/McCloud regulations wef 1st October

- As above
- Working with Avon Fire and Rescue to implement



Work Spikes & Projects

Root cause

Fire scheme exit (31/2/24)

Improvement actions


- Temporary deployment of extra staff to assist project work
- Should reduce workload by 1 FTE after 1st February

ABS spike in work

- Task force to address incoming work

Pensions Increase errors

- Officers working on cases manually in advance of project



Increased demand

Increased demand

ABS spike in emails/phone calls

Increase in case work load

Increase in Retirements & Deaths

Backlogs

Improvement actions

- Task force to address work spike
- Reduced phone service trial to create capacity for processing
- Ongoing website development to improve member servicing
- Weekly resources focused on these cases
- Officers from other teams supporting
- Focus on clearance of older cases
- Identify complex cases for review

Improvement pathway

	Q4 2023	Q1 2024	Q2 2024	Q3 2024
People	<ul style="list-style-type: none"> Ongoing recruitment 	<ul style="list-style-type: none"> Recruit Payroll Manager Target priority cases within KPI's 	<ul style="list-style-type: none"> New Korn Ferry structure/pay implemented 	<ul style="list-style-type: none"> Embedded structure Newly trained officers become effective
Processes	<ul style="list-style-type: none"> Agree refund policy to streamline processing 	<ul style="list-style-type: none"> Launch of new member website (improved "how to" and "tell us" content) 	<ul style="list-style-type: none"> Start review of bulk processing Implement improvement for digital processes for new members 	
Regulations		<ul style="list-style-type: none"> KPI target review Review Customer Charter & Admin Strategy 	<ul style="list-style-type: none"> Begin McCloud Remedy 	
Work spikes	<ul style="list-style-type: none"> Consultant support 	<ul style="list-style-type: none"> Fire scheme exited (increase capacity) 		
Demand	<ul style="list-style-type: none"> Task force with focus on priority cases 		<ul style="list-style-type: none"> New staff working on backlogs 	<ul style="list-style-type: none"> PI review complete Backlogs consistently reducing

Future road map.....

