

Administration Update September 2024

Claire Newbery

Pensions Operations Manager



Avon
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Agenda



- Restructure
- Workflow & MI
- Pensions Increase – Phase 2
- Pensions Dashboard

Restructure update



- New structure in place wef 1st August
- All Ring-fenced officers got their first choice of roles
- New roles and grading take effect from 1st August
- All officers received confirmatory letters

Next Steps

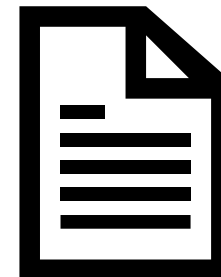
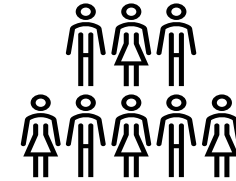
- Recruitment into new structure & new roles – Q3-Q4
- Movement of work and responsibilities – Q3

Workflow & MI



Q1 and beyond – what’s been happening

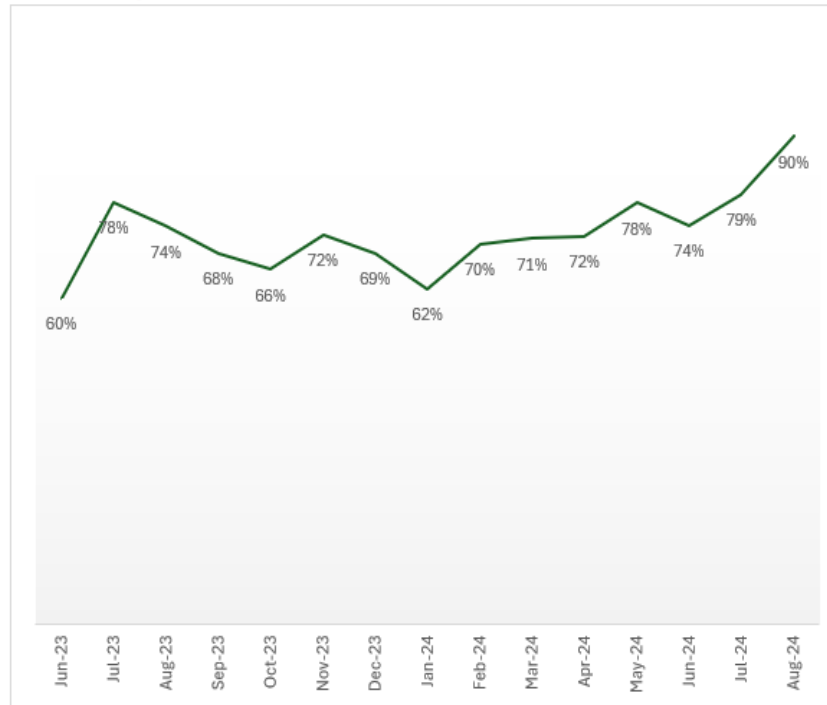
- Permanent team leaders appointed
- Training – new and existing officers
- Continued focus us on backlogs
- Temporary “retirement team”
- Deeper MI insight



SLA monthly performance average July 23 – 18th August 24

Average SLA Performance

*Based on weekly KPI data

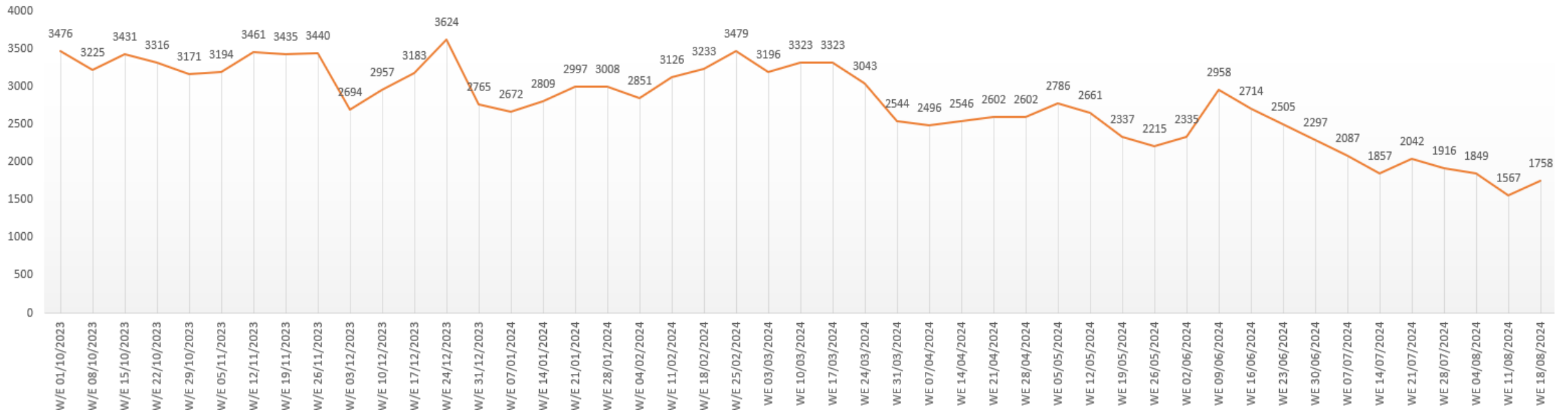


KPI Category	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Cases Created Jul-23 to 18th Aug 24
Death Notification	25%	25%	59%	68%	74%	64%	92%	57%	20%	62%	46%	31%	65%	64.6%	89.7%	758
Death - Act/Def/Pen - Payment	76%	67%	87%	47%	77%	79%	84%	76%	68%	88%	100%	69%	88%	93.2%	100.0%	601
Retirement (Active) - Quote	58%	72%	37%	37%	30%	25%	39%	32%	37%	30%	31%	30%	35%	51.5%	81.0%	2,101
Retirement (Active) - Actual	64%	86%	60%	91%	68%	73%	83%	77%	76%	95%	95%	77%	47%	78.1%	90.7%	1,223
Retirement (Deferred) - Quote	83%	97%	62%	36%	34%	28%	38%	17%	30%	35%	36%	57%	60%	91.0%	83.2%	2,660
Retirement (Deferred) - Actual	54%	78%	71%	50%	90%	83%	73%	52%	33%	82%	75%	66%	40%	68.5%	97.9%	1,719
Divorce - Quote	N/A	82%	100%	92%	100%	67%	84%	39%	78%	49%	59%	66%	66%	83.2%	100.0%	335
Divorce - Actual	N/A	0%	N/A	N/A	100%	N/A	N/A	100%	N/A	N/A	N/A	N/A	N/A	100.0%	100.0%	10
Refund - Quotes	0%	24%	24%	25%	5%	26%	15%	31%	66%	68%	22%	77%	69%	33.7%	88.4%	3,633
Refund - Actual	50%	19%	62%	89%	72%	93%	37%	12%	31%	13%	84%	85%	65%	77.8%	88.0%	1,145
Deferred Benefits	50%	72%	64%	44%	34%	73%	35%	35%	50%	28%	62%	67%	62%	79.5%	79.1%	3,374
Transfer In (Active) - Quote	0%	50%	6%	50%	0%	9%	19%	20%	17%	26%	3%	6%	13%	17.2%	73.8%	512
Transfer In (Active) - Actual	N/A	50%	56%	67%	18%	54%	50%	0%	29%	64%	100%	33%	56%	27.5%	55.6%	153
Transfer Out (Active/Deferred) - Quote	N/A	45%	41%	0%	22%	4%	29%	14%	17%	1%	16%	14%	4%	30.0%	26.2%	1,330
Transfer Out (Active/Deferred) - Actual	N/A	44%	40%	0%	55%	94%	100%	100%	100%	100%	73%	100%	100%	93.8%	100.0%	138
Employer Estimate - Quote	74%	67%	100%	79%	60%	54%	50%	93%	89%	77%	65%	100%	36%	93.8%	77.8%	243
Member Estimate - Quote	78%	99%	98%	81%	83%	92%	88%	94%	99%	81%	66%	94%	50%	85.1%	92.9%	827
Joiner	82%	98%	98%	98%	96%	99%	99%	93%	100%	100%	100%	100%	100%	98.5%	100.0%	16,395
Weighted Average	60%	78%	74%	68%	66%	72%	69%	62%	70%	71%	72%	78%	74%	79%	90%	

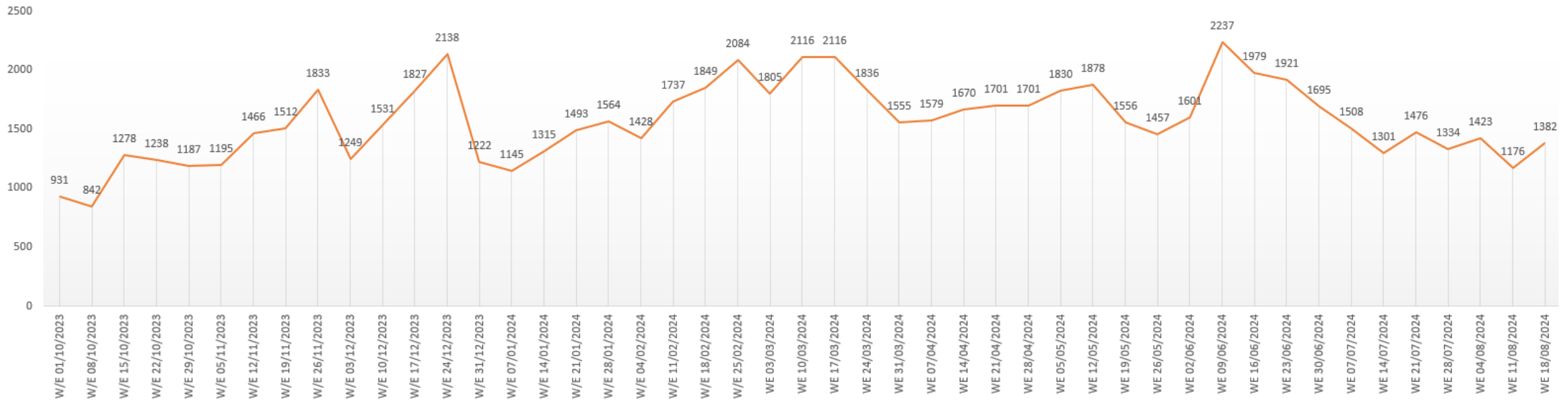
KPI cases completed as % July & August 24

		01/07/2024 to 18/08/2024									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	75%	21%	1%	-	1%	-	-	-	-	1%
Death - Act/Def/Pen - Payment	10 Days	86%	11%	1%	1%	1%	-	-	-	-	-
Retirement (Active) - Quote	15 Days	29%	23%	9%	6%	5%	5%	6%	3%	4%	10%
Retirement (Active) - Actual	15 Days	75%	7%	4%	3%	2%	2%	4%	-	-	3%
Retirement (Deferred) - Quote	30 Days	9%	16%	19%	38%	6%	2%	5%	-	1%	4%
Retirement (Deferred) - Actual	15 Days	57%	17%	7%	10%	3%	2%	3%	-	1%	-
Divorce - Quote	45 Days	32%	15%	5%	12%	3%	3%	7%	5%	13%	5%
Divorce - Actual	15 Days	-	100%	-	-	-	-	-	-	-	-
Refund - Quotes	10 Days	28%	25%	15%	22%	2%	2%	5%	0%	0%	1%
Refund - Actual	10 Days	37%	35%	14%	4%	3%	1%	1%	1%	2%	1%
Deferred Benefits	30 Days	12%	17%	20%	18%	7%	7%	9%	2%	2%	6%
Transfer In (Active) - Quote	10 Days	18%	24%	11%	12%	7%	5%	4%	2%	1%	16%
Transfer In (Active) - Actual	10 Days	31%	7%	-	2%	3%	-	3%	3%	33%	18%
Transfer Out (Active/Deferred) - Quote	10 Days	16%	7%	2%	4%	4%	0%	7%	7%	4%	50%
Transfer Out (Active/Deferred) - Actual	10 Days	74%	23%	3%	-	-	-	-	-	-	-
Employer Estimate - Quote	15 Days	47%	41%	3%	-	-	3%	3%	-	3%	-
Member Estimate - Quote	15 Days	60%	21%	1%	2%	3%	4%	4%	1%	-	3%
Joiner	40 Days	9%	3%	5%	39%	44%	-	-	-	-	-

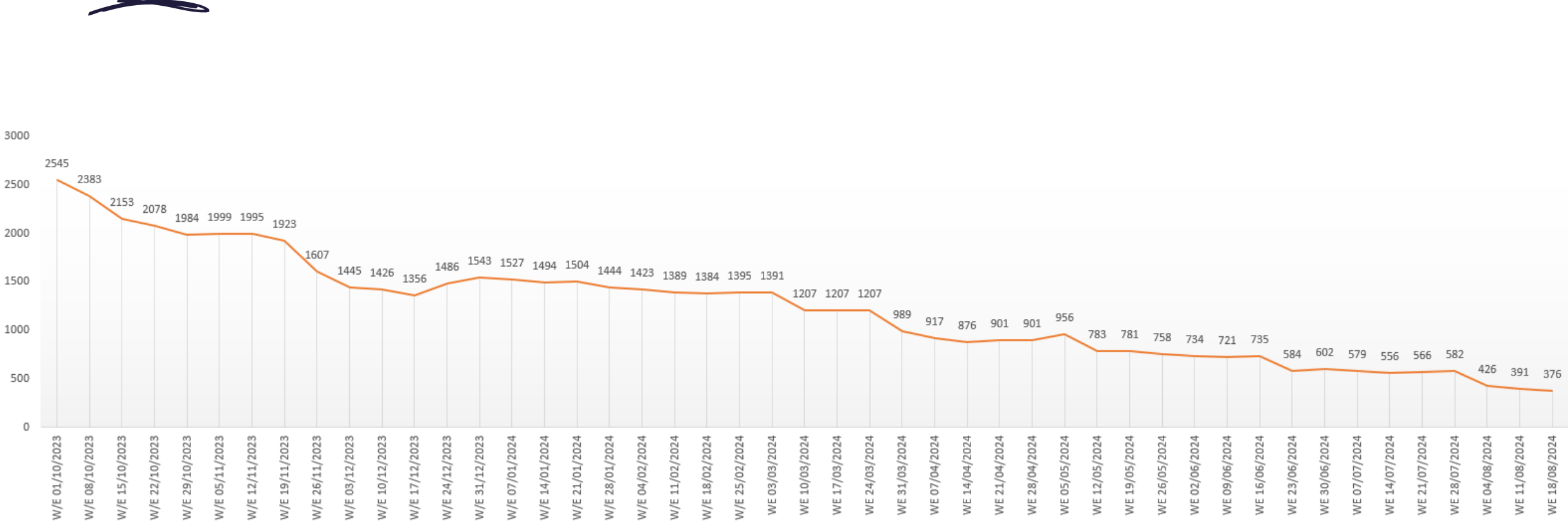
Total KPI's outstanding



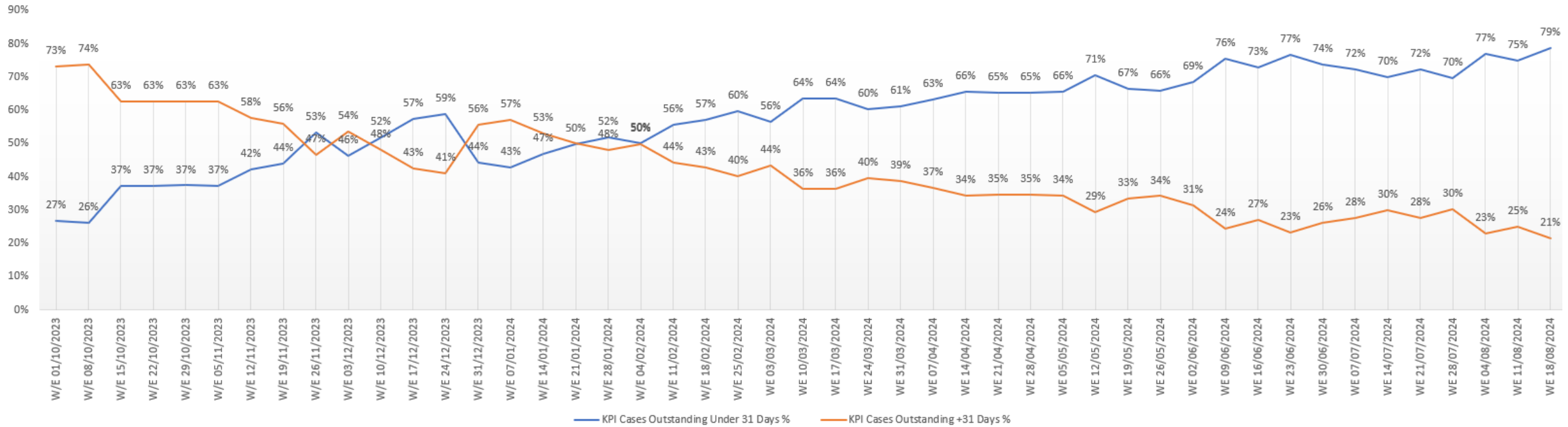
KPI cases outstanding under 31 days



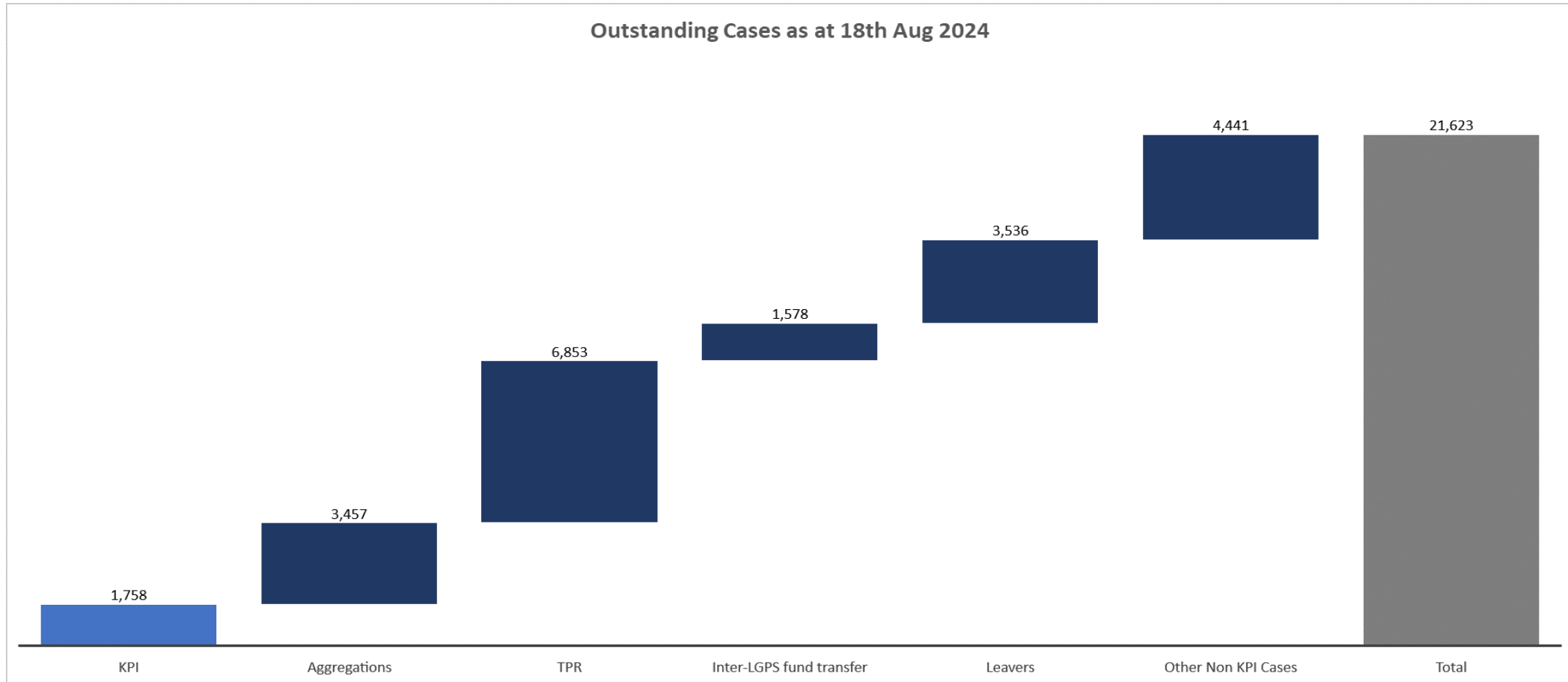
KPI's outstanding over 31 days



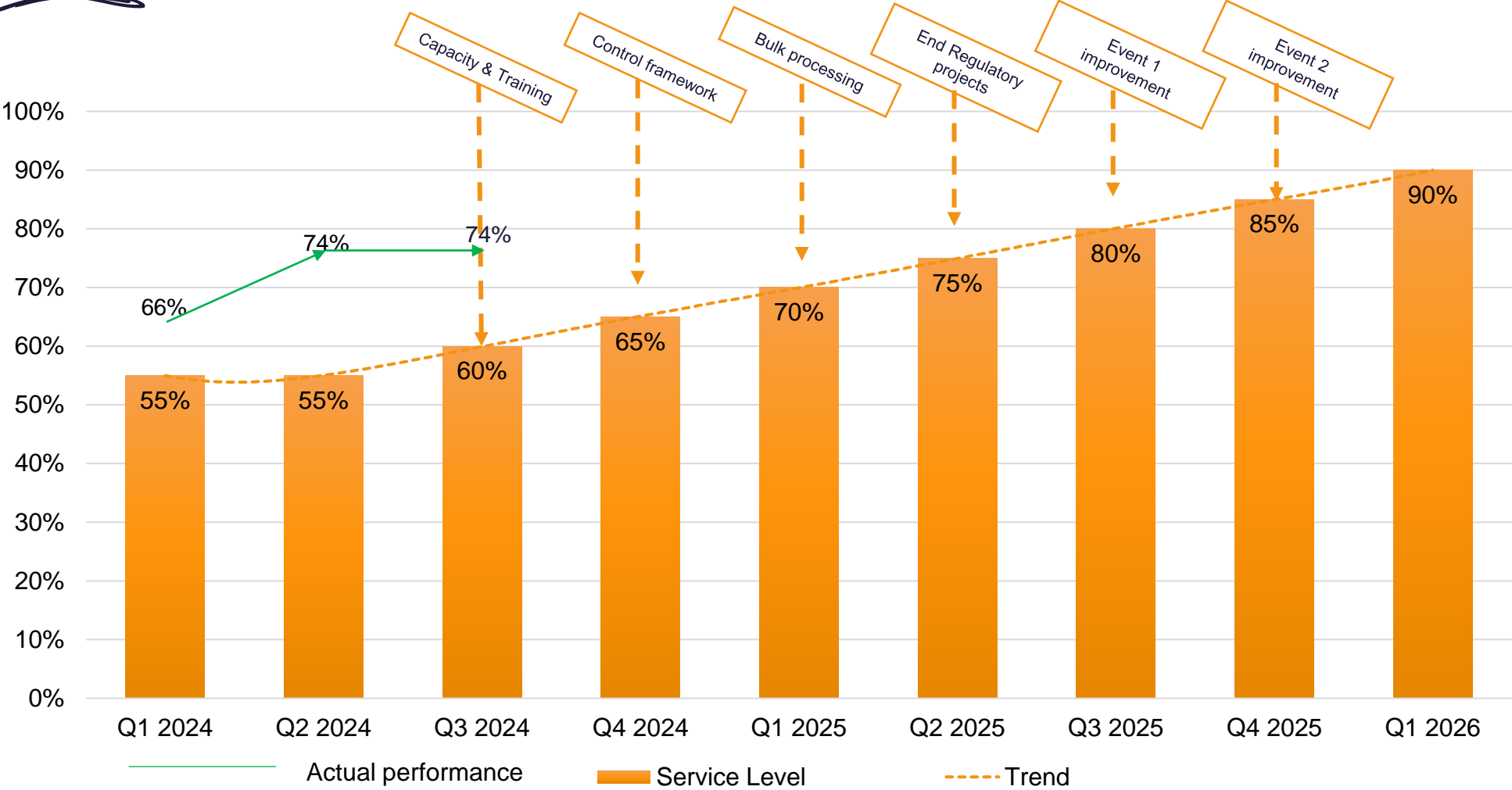
KPI's case by age



All outstanding cases August 2024



Service performance – plan v's actual – August 24



Pension Increase remediation update



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Phase 2 – Completed



- 39 cases have been manually calculated, with arrears / interest paid in July and August 2024.
- 95 cases are going through the bulk remediation process and will have the arrears / interest paid in September 2024.
- 68 cases have been reviewed and no further remediation is due.

Total = 202 completed

Phase 2 –What's in progress



- 11 suspended child pensions have had arrears calculated. Dependants have been written to for current bank details.
- 39 death cases have been reviewed and arrears are being calculated.
- 10 cases are currently in checking

Total = 60 in progress

Phase 2 – What's left



- 142 pensions suspended from outset (Member tracing) – These members are being traced and this population will be removed from the project as they are not a pension increase issue. These will be owned and dealt with as part of the normal tracing process.
- 94 GMP cases. These are complex cases and will require manual calculation and resolution.
- 11 Payroll cases – Once payroll queries are resolved, increases will need to be calculated.

Total = 247 – 142 = 105 to action

Thank you



If you have any questions please contact:

Claire Newbery

Pensions Operations Manager

Claire_Newbery@bathnes.gov.uk

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KPI cases completed July & August 24

		01/07/2024 to 18/08/2024									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	67	19	1	0	1	0	0	0	0	1
Death - Act/Def/Pen - Payment	10 Days	71	9	1	1	1	0	0	0	0	0
Retirement (Active) - Quote	15 Days	73	59	22	15	13	12	15	8	9	26
Retirement (Active) - Actual	15 Days	139	13	8	5	4	3	7	0	0	6
Retirement (Deferred) - Quote	30 Days	49	84	100	206	33	9	28	2	7	21
Retirement (Deferred) - Actual	15 Days	222	65	26	41	13	7	13	0	3	1
Divorce - Quote	45 Days	19	9	3	7	2	2	4	3	8	3
Divorce - Actual	15 Days	0	2	0	0	0	0	0	0	0	0
Refund - Quotes	10 Days	95	83	51	73	7	6	16	1	0	3
Refund - Actual	10 Days	55	52	21	6	4	1	2	1	3	2
Deferred Benefits	30 Days	45	66	79	71	26	27	33	7	8	25
Transfer In (Active) - Quote	10 Days	22	29	13	14	8	6	5	2	1	19
Transfer In (Active) - Actual	10 Days	19	4	0	1	2	0	2	2	20	11
Transfer Out (Active/Deferred) - Quote	10 Days	9	4	1	2	2	0	4	4	2	28
Transfer Out (Active/Deferred) - Actual	10 Days	23	7	1	0	0	0	0	0	0	0
Employer Estimate - Quote	15 Days	15	13	1	0	0	1	1	0	1	0
Member Estimate - Quote	15 Days	87	30	2	3	5	6	6	1	0	5
Joiner	40 Days	134	42	70	601	673	5	2	5	1	2

KPI cases completed, cumulative % July & August 24

		01/07/2024 to 18/08/2024									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	75%	97%	98%	98%						
Death - Act/Def/Pen - Payment	10 Days	86%	96%	98%	99%	100%	100%	100%			
Retirement (Active) - Quote	15 Days	29%	52%	61%	67%	72%	77%	83%	86%	90%	100%
Retirement (Active) - Actual	15 Days	75%	82%	86%	89%	91%	93%	97%	97%	97%	100%
Retirement (Deferred) - Quote	30 Days	9%	25%	43%	81%	88%	89%	94%	94%	96%	100%
Retirement (Deferred) - Actual	15 Days	57%	73%	80%	91%	94%	96%	99%	99%	100%	100%
Divorce - Quote	45 Days	32%	47%	52%	63%	67%	70%	77%	82%	95%	100%
Divorce - Actual	15 Days	-	100%	100%	100%	100%	100%	100%	100%	100%	100%
Refund - Quotes	10 Days	28%	53%	68%	90%	92%	94%	99%	99%	99%	100%
Refund - Actual	10 Days	37%	73%	87%	91%	94%	95%	96%	97%	99%	100%
Deferred Benefits	30 Days	12%	29%	49%	67%	74%	81%	90%	91%	94%	100%
Transfer In (Active) - Quote	10 Days	18%	43%	54%	66%	72%	77%	82%	83%	84%	100%
Transfer In (Active) - Actual	10 Days	31%	38%	38%	39%	43%	43%				
Transfer Out (Active/Deferred) - Quote	10 Days	16%	23%	25%	29%	32%	32%	39%	46%	50%	100%
Transfer Out (Active/Deferred) - Actual	10 Days	74%	97%	100%							
Employer Estimate - Quote	15 Days	47%	88%	91%	91%	91%	94%	97%	97%	100%	
Member Estimate - Quote	15 Days	60%	81%	82%	84%	88%	92%	96%	97%	97%	100%
Joiner	40 Days	9%	11%	16%	55%	99%	99%	99%			