Administration Update December 2024

Claire Newbery

Pensions Operations Manager







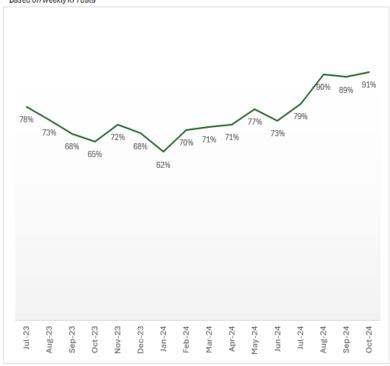
- Workflow & MI
- Priorities for next 3 months



SLA monthly performance average July 2023 to October 2024

Average SLA Perfomance

*Based on weekly KPI data



| KPI Category | 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 | Sep-24 | Oct-24 | Cases Created Jun-23 to Oct-24 |
|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-----------------------------------|
| Death Notification | 25% | 59% | 68% | 74% | 64% | 92% | 57% | 20% | 62% | 46% | 31% | 65% | 65% | 84% | 85% | 95% | 791 |
| Death - Act/Def/Pen - Payment | 67% | 87% | 47% | 77% | 79% | 84% | 76% | 68% | 88% | 100% | 69% | 88% | 93% | 100% | 67% | 63% | 624 |
| Retirement (Active) - Quote | 72% | 37% | 37% | 30% | 25% | 39% | 32% | 37% | 30% | 31% | 30% | 35% | 52% | 81% | 86% | 85% | 2,493 |
| Retirement (Active) - Actual | 86% | 60% | 91% | 68% | 73% | 83% | 77% | 76% | 95% | 95% | 77% | 47% | 78% | 91% | 95% | 99% | 1,492 |
| Retirement (Deferred) - Quote | 97% | 62% | 36% | 34% | 28% | 38% | 17% | 30% | 35% | 36% | 57% | 60% | 91% | 83% | 92% | 88% | 2,960 |
| Retirement (Deferred) - Actual | 78% | 71% | 50% | 90% | 83% | 73% | 52% | 33% | 82% | 75% | 66% | 40% | 68% | 98% | 98% | 94% | 2,038 |
| Divorce - Quote | 82% | 100% | 92% | 100% | 67% | 84% | 39% | 78% | 49% | 59% | 66% | 66% | 83% | 100% | 100% | 93% | 346 |
| Divorce - Actual | 0% | N/A | N/A | 100% | N/A | N/A | 100% | N/A | N/A | N/A | N/A | N/A | 100% | 100% | 100% | 100% | 16 |
| Refund - Quotes | 24% | 24% | 25% | 5% | 26% | 15% | 31% | 66% | 68% | 22% | 77% | 69% | 34% | 88% | 91% | 79% | 3,804 |
| Refund - Actual | 19% | 62% | 89% | 72% | 93% | 37% | 12% | 31% | 13% | 84% | 85% | 65% | 78% | 88% | 88% | 95% | 1,301 |
| Deferred Benefits | 72% | 64% | 44% | 34% | 73% | 35% | 35% | 50% | 28% | 62% | 67% | 62% | 80% | 79% | 60% | 94% | 3,655 |
| Transfer In (Active) - Quote | 50% | 6% | 50% | 0% | 9% | 19% | 20% | 17% | 26% | 3% | 6% | 13% | 17% | 74% | 77% | 90% | 607 |
| Transfer In (Active) - Actual | 50% | 56% | 67% | 18% | 54% | 50% | 0% | 29% | 64% | 100% | 33% | 56% | 27% | 56% | 86% | 28% | 219 |
| Transfer Out (Active/Deferred) - Quote | 45% | 41% | 0% | 22% | 4% | 29% | 14% | 17% | 1% | 16% | 14% | 4% | 30% | 26% | 14% | 19% | 1,522 |
| Transfer Out (Active/Deferred) - Actual | 44% | 40% | 0% | 55% | 94% | 100% | 100% | 100% | 100% | 73% | 100% | 100% | 94% | 100% | 100% | 100% | 159 |
| Employer Estimate - Quote | 67% | 100% | 79% | 60% | 54% | 50% | 93% | 89% | 77% | 65% | 100% | 36% | 94% | 78% | 93% | 91% | 238 |
| Member Estimate - Quote | 99% | 98% | 81% | 83% | 92% | 88% | 94% | 99% | 81% | 66% | 94% | 50% | 85% | 93% | 95% | 93% | 897 |
| Joiner | 98% | 98% | 98% | 96% | 99% | 99% | 93% | 100% | 100% | 100% | 100% | 100% | 99% | 100% | 100% | 100% | 17,645 |
| Weighted Average | 78% | 73% | 68% | 65% | 72% | 68% | 62% | 70% | 71% | 71% | 77% | 73% | 79% | 90% | 89% | 91% | <u> </u> |

KPI cases completed Oct 2024 – 17th Nov 2024



| | | 01/10/2024 to 17/11/2024 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 | 56 | 6 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Death - Act/Def/Pen - Payment | 10 Days | 18 | 9 | 5 | 3 | 1 | 0 | 1 | 0 | 0 | 0 | | |
| Retirement (Active) - Quote | 15 Days | 81 | 81 | 35 | 16 | 8 | 7 | 6 | 0 | 2 | 12 | | |
| Retirement (Active) - Actual | 15 Days | 146 | 45 | 4 | 1 | 0 | 0 | 1 | 1 | 0 | 1 | | |
| Retirement (Deferred) - Quote | 30 Days | 20 | 81 | 73 | 96 | 25 | 8 | 13 | 6 | 8 | 7 | | |
| Retirement (Deferred) - Actual | 15 Days | 181 | 31 | 5 | 3 | 3 | 1 | 1 | 2 | 1 | 1 | | |
| Divorce - Quote | 45 Days | 14 | 6 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | | |
| Divorce - Actual | 15 Days | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | | |
| Refund - Quotes | 10 Days | 120 | 98 | 27 | 12 | 1 | 0 | 0 | 0 | 1 | 0 | | |
| Refund - Actual | 10 Days | 55 | 7 | 2 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | | |
| Deferred Benefits | 30 Days | 68 | 50 | 64 | 19 | 16 | 6 | 8 | 2 | 2 | 14 | | |
| Transfer In (Active) - Quote | 10 Days | 38 | 15 | 4 | 2 | 2 | 0 | 0 | 1 | 0 | 1 | | |
| Transfer In (Active) - Actual | 10 Days | 4 | 7 | 10 | 8 | 7 | 2 | 0 | 0 | 0 | 1 | | |
| Transfer Out (Active/Deferred) - Quote | 10 Days | 11 | 9 | 17 | 12 | 8 | 11 | 15 | 20 | 24 | 23 | | |
| Transfer Out (Active/Deferred) - Actual | 10 Days | 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Employer Estimate - Quote | 15 Days | 17 | 3 | 5 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Member Estimate - Quote | 15 Days | 23 | 33 | 2 | 2 | 1 | 0 | 0 | 0 | 0 | 1 | | |
| Joiner | 40 Days | 252 | 79 | 363 | 1375 | 117 | 4 | 0 | 0 | 0 | 0 | | |

KPI cases completed Oct 2024 to 17th Nov 24 (case numbers v target % of total completed within day range)



| | 1 | | | | | | | | | | | |
|---|---------|--------|---------|----------|----------|----------|------------|----------|----------|----------|------|-----------|
| | | | | | | | 2024 to 17 | | , | | | |
| | | | | | | Actu | al Days to | Process | | | | |
| | | | | | | | | | | | | Completed |
| | | 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+ | Within |
| | | | | | | | | | | | | Target |
| Death Notification | 5 Days | 89% | 10% | - | 2% | | - | - | - | - | - | 89% |
| Death - Act/Def/Pen - Payment | 10 Days | 49% | 24% | 14% | 8% | 3% | - | 3% | - | - | - | 73% |
| Retirement (Active) - Quote | 15 Days | 33% | 33% | 14% | 6% | 3% | 3% | 2% | - | 1% | 5% | 79% |
| Retirement (Active) - Actual | 15 Days | 73% | 23% | 2% | 1% | - | - | 1% | 1% | - | 1% | 98% |
| Retirement (Deferred) - Quote | 30 Days | 6% | 24% | 22% | 28% | 7% | 2% | 4% | 2% | 2% | 2% | 90% |
| Retirement (Deferred) - Actual | 15 Days | 79% | 14% | 2% | 1% | 1% | 0% | 0% | 0.9% | 0.4% | 0.4% | 95% |
| Divorce - Quote | 45 Days | 64% | 27% | 5% | - | - | - | - | - | - | 5% | 95% |
| Divorce - Actual | 15 Days | 33% | 33% | - | - | - | 33% | /- | - | 1 | - | 67% |
| Refund - Quotes | 10 Days | 46% | 38% | 10% | 5% | 0% | 0% | 0% | 0.0% | 0% | 0% | 84% |
| Refund - Actual | 10 Days | 85% | 11% | 3% | - | - | - | 2% | 1 | , | - | 95% |
| Deferred Benefits | 30 Days | 27% | 20% | 26% | 8% | 6% | 2% | 3% | 1% | 1% | 6% | 90% |
| Transfer In (Active) - Quote | 10 Days | 60% | 24% | 6% | 3% | 3% | - | - | 2% | - | 2% | 84% |
| Transfer In (Active) - Actual | 10 Days | 10% | 18% | 26% | 21% | 18% | 5% | - | - | - | 3% | 28% |
| Transfer Out (Active/Deferred) - Quote | 10 Days | 7% | 6% | 11% | 8% | 5% | 7% | 10% | 13% | 16% | 15% | 13% |
| Transfer Out (Active/Deferred) - Actual | 10 Days | 100% | - | - | - | - | - | - | - | - | - | 100% |
| Employer Estimate - Quote | 15 Days | 65% | 12% | 19% | 4% | - | - | - | - | - | - | 96% |
| Member Estimate - Quote | 15 Days | 37% | 53% | 3% | 3% | 2% | - | - | - | - | 2% | 94% |
| Joiner | 40 Days | 12% | 4% | 17% | 63% | 5% | 0% | - | - | - | - | 100.0% |

KPI cases completed Oct 2024 to 17th Nov 2024 (cases numbers v target – cumulative % processed)

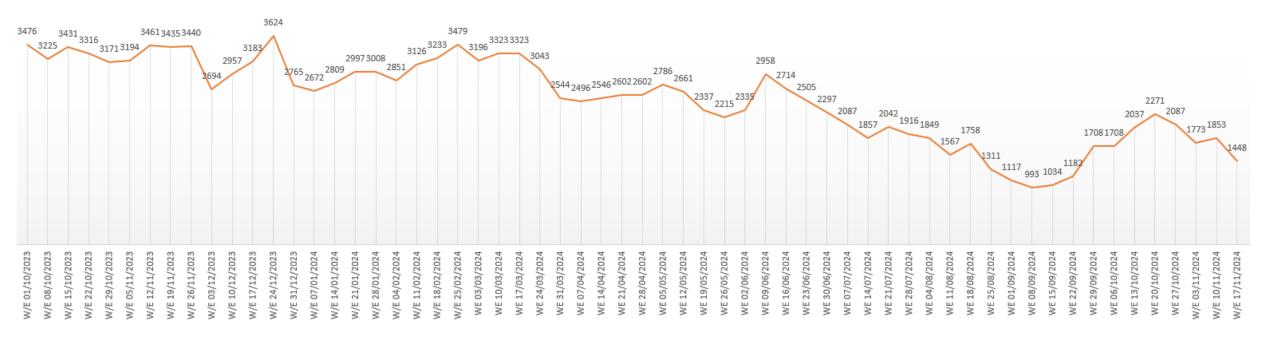


| | | 01/10/2024 to 17/11/2024 | | | | | | | | | | | | |
|---|---------|--------------------------|---------|----------|----------|------------|----------|----------|----------|----------|------|--|--|--|
| | | | | | | ctual Days | | | | | | | | |
| | | 0 to 5 | 6 to 10 | 11 to 15 | 16 to 20 | 21 to 25 | 26 to 30 | 31 to 40 | 41 to 45 | 46 to 59 | 60+ | | | |
| Death Notification | 5 Days | 89% | 98% | 98% | 100% | | | | | | | | | |
| Death - Act/Def/Pen - Payment | 10 Days | 49% | 73% | 86% | 95% | 97% | 97% | 100% | | | | | | |
| Retirement (Active) - Quote | 15 Days | 33% | 65% | 79% | 86% | 89% | 92% | 94% | 94% | 95% | 100% | | | |
| Retirement (Active) - Actual | 15 Days | 73% | 96% | 98% | 98% | 98% | 98% | 99% | 99% | 99% | 100% | | | |
| Retirement (Deferred) - Quote | 30 Days | 6% | 30% | 52% | 80% | 88% | 90% | 94% | 96% | 98% | 100% | | | |
| Retirement (Deferred) - Actual | 15 Days | 79% | 93% | 95% | 96% | 97% | 98% | 98% | 99% | 100% | | | | |
| Divorce - Quote | 45 Days | 64% | 91% | 95% | 95% | 95% | 95% | 95% | 95% | 95% | 100% | | | |
| Divorce - Actual | 15 Days | 33% | 67% | 67% | 67% | 67% | 100% | | | | | | | |
| Refund - Quotes | 10 Days | 46% | 84% | 95% | 99% | 100% | 100% | | | | | | | |
| Refund - Actual | 10 Days | 85% | 95% | 98% | 98% | 98% | 98% | 100% | | | | | | |
| Deferred Benefits | 30 Days | 27% | 47% | 73% | 81% | 87% | 90% | 93% | 94% | 94% | 100% | | | |
| Transfer In (Active) - Quote | 10 Days | 60% | 84% | 90% | 94% | 97% | 97% | 97% | 98% | 98% | 100% | | | |
| Transfer In (Active) - Actual | 10 Days | 10% | 28% | 54% | 74% | 92% | 97% | 97% | 97% | 97% | 100% | | | |
| Transfer Out (Active/Deferred) - Quote | 10 Days | 7% | 13% | 25% | 33% | 38% | 45% | 55% | 69% | 85% | 100% | | | |
| Transfer Out (Active/Deferred) - Actual | 10 Days | 100% | 100% | 100% | | | | | | | | | | |
| Employer Estimate - Quote | 15 Days | 65% | 77% | 96% | 100% | | | | | | | | | |
| Member Estimate - Quote | 15 Days | 37% | 90% | 94% | 97% | 98% | 98% | 98% | 98% | 98% | 100% | | | |
| Joiner | 40 Days | 12% | 15% | 32% | 94% | 100% | | | | | | | | |

Total KPI's outstanding – Oct 2023 to 17th Nov 2024



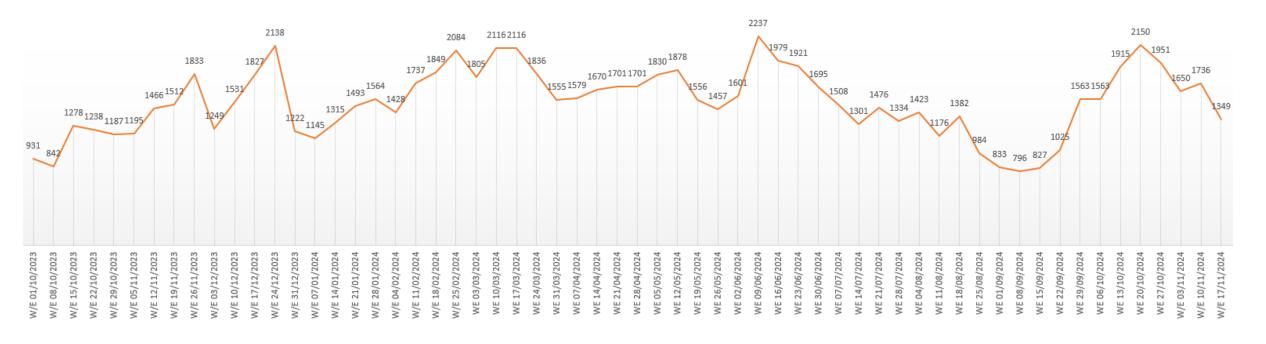
KPI Cases Outstanding



KPI cases outstanding under 31 days – Oct 2023 – 17th Nov 2024



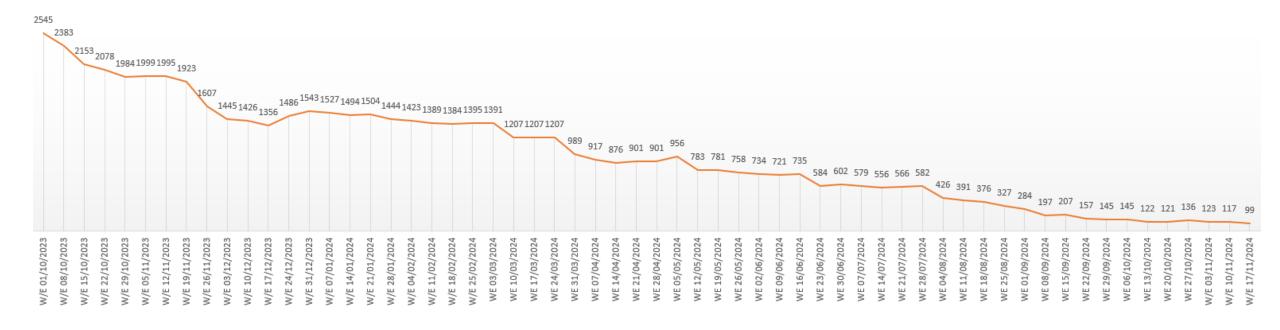
KPI Cases Outstanding Under 31 Days



KPI's outstanding over 31 days – Oct 2023 to 17th Nov 2024



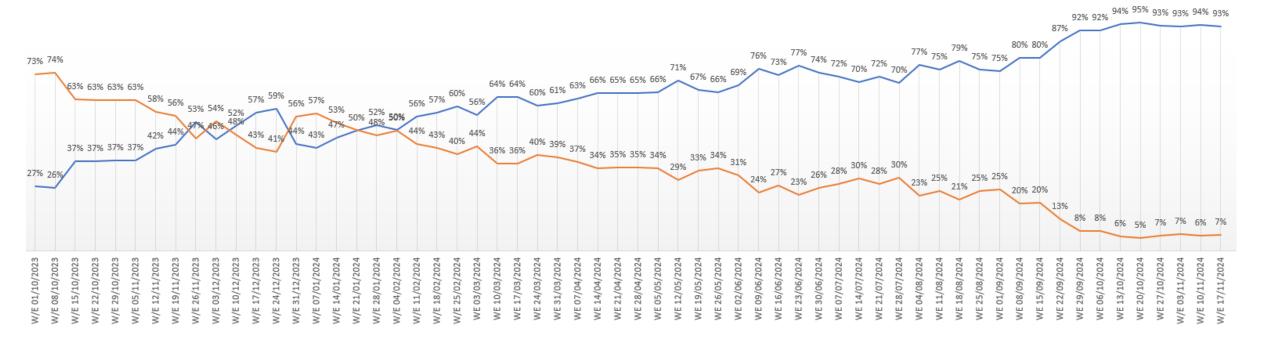
KPI Cases Outstanding 31+ Days



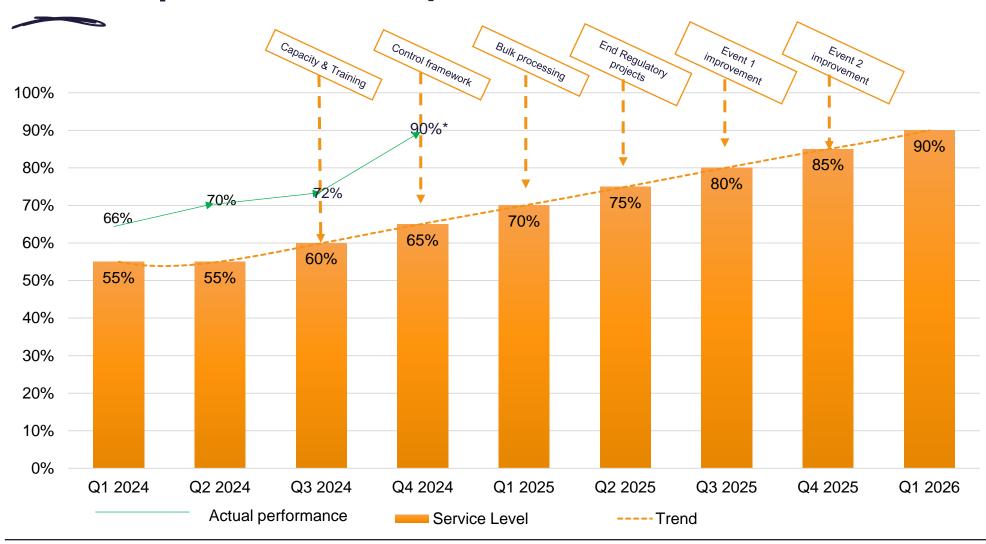
KPI's case by age % - Oct 2023 to 17th Nov 2024







Service performance – plan v's actual – 17th Nov 24

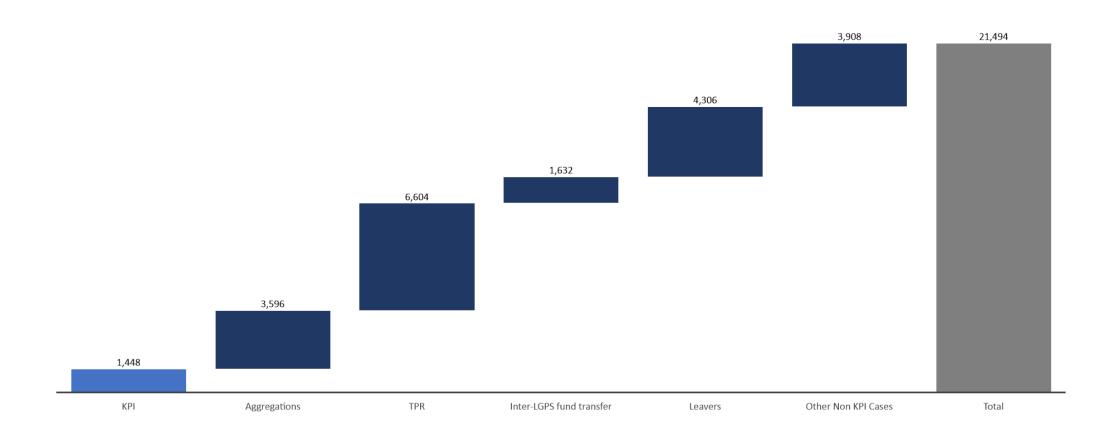


^{*} Current Q4 as at 17th Nov 24

Non KPI workload

All outstanding cases – 17th Nov 2024

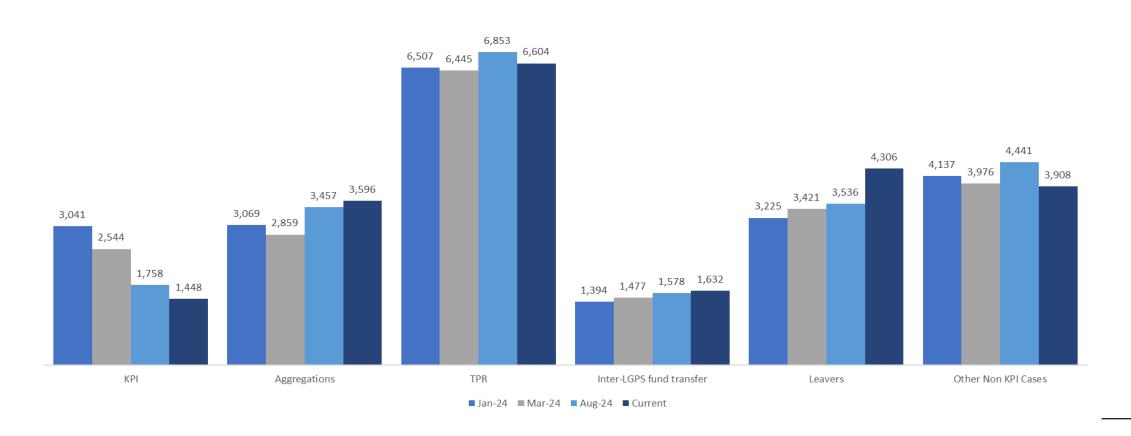
Outstanding Cases as at 17th Nov-24



All outstanding cases by type comparison Jan 24 – 17th Nov 24



Outstanding Cases Comparison



Priorities for 2025



- Complete procurement for main Pensions Administration System (PAS) inc Pensions Dashboard
- Implement Hosting of PAS
- Implement Pensions Dashboard
- Implement new member portal Engage
- McCloud remedy

- GMP project reconciliation
- Controls review

Thank you



If you have any questions please contact:

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