

Appendix 3 – Administration KPIs

An analysis of the administrative performance over the period

1 June 2024 – 31 August 2024



Internally set targets

The Fund's internally set administration targets are set to help met the goals of the Fund's business plan. The Fund also must meet certain disclosure targets, but these will now only be monitored on an exceptions basis (i.e. if we are failing).

Table 1: Performance over 1 June 2024 to 31 August 2024

Priority Category	Process	SLA (Working days)	Target KPI	Closing cases prior report	Terminated Cases	Cases Open at Start	Cases received	Cases processed	Cases open at end	Case Change	Completed on target
High	Deaths	5/10/20 days	95%	292	50	292	515	514	293	●	89%
High	Retirements	10/20 days	95%	381	233	381	854	794	441	●	75%
High	Refund	10 days	95%	9	8	9	182	174	17	●	98%
High	Complaints	5/46 Days	95%	3	0	3	3	4	2	●	75%
Medium	Transfer Out	10/20 days	90%	255	113	255	581	617	219	●	79%
Medium	Transfer In	10/15/20 days	90%	38	8	38	48	43	43	●	56%
Medium	Aggregation	23 days - 1 year	90%	1426	241	1426	812	636	1602	●	59%
Medium	Leaver	23 days - 46 days	90%	175	262	175	1952	1791	336	●	95%
Medium	Divorce	20 - 25 days	90%	517	5	517	1195	1360	352	●	77%
Medium	General	5/10/46/69 Days	90%	215	139	215	218	250	183	●	59%
Low	Starters	46 Days	80%	48	0	48	2047	2068	27	●	99%
Low	General - ABS	1/5 Days	80%	0	0	0	8	7	1	●	100%

*red alert shown for anything below 10% of tolerable performance



Process	Reply Due	In Office	Of which: Currently within SLA	Of which: Already beyond SLA
Deaths	244	49	262	31
Retirements	204	237	388	53
Refund	17	0	17	0
Complaints	2	0	0	2
Transfer Out	107	112	166	53
Transfer In	24	19	33	10
Aggregation	495	1107	1129	473
Leaver	246	90	280	56
Divorce	149	203	350	2
General	93	90	101	82
Starters	22	5	27	0
General - ABS	1	0	0	1
Total	1604	1912	2753	763

*Table 1 shows the Fund's process times against the timeframes set out

in the administration strategy

Table 2: Monthly breakdown of completion on target percentage

				Financial QTR3 Jul - Sept 2023	Financial QTR4 Oct - Dec 2023	Yearly QTR1Jan - Mar 2024	Yearly QTR2Apr - Jun 2024	July	August
Priority Category	Process	SLA (Working days)	Target KPI	Completed on target	Completed on target	Completed on target	Completed on target	Completed on target	Completed on target
High	Deaths	5/10/20 days	95%	82%	92%	77%	77%	91%	93%
High	Retirements	10/20 days	95%	75%	70%	55%	63%	75%	73%
High	Refunds	10 days	95%	99%	100%	99%	99%	99%	99%
High	Complaints	5/46 Days	95%				0%	50%	100%
Medium	Transfers Out	10/20 days	90%	61%	66%	52%	68%	53%	76%
Medium	Transfers In	10/15/20 days	90%	69%	68%	60%	44%	64%	50%
Medium	Aggregations	23 days - 1 year	90%	78%	83%	77%	68%	56%	64%
Medium	Leavers	23 days - 46 days	90%	70%	79%	84%	79%	98%	95%
Medium	Divorce	20 - 25 days	90%	80%	80%	73%	66%	81%	95%
Medium	General	5/10/46/69 Days	90%				74%	78%	75%
Low	Starters	46 Days	80%				100%	100%	100%
Low	General - ABS	47 Days	80%						100%

*red alert shown for anything below 10% of target KPI

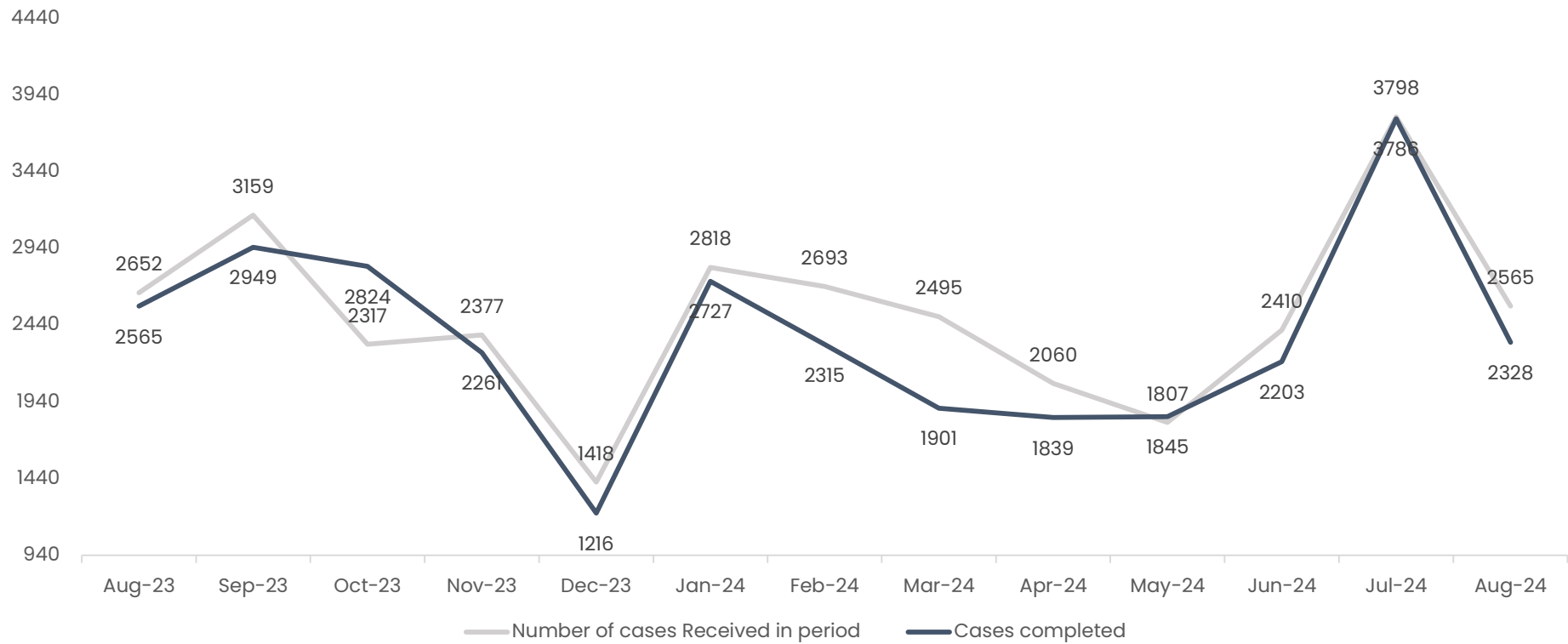
Table 3: 'In Office' (as at 31 August 2024)

*'In Office' refers to any cases that are currently ready to be worked on

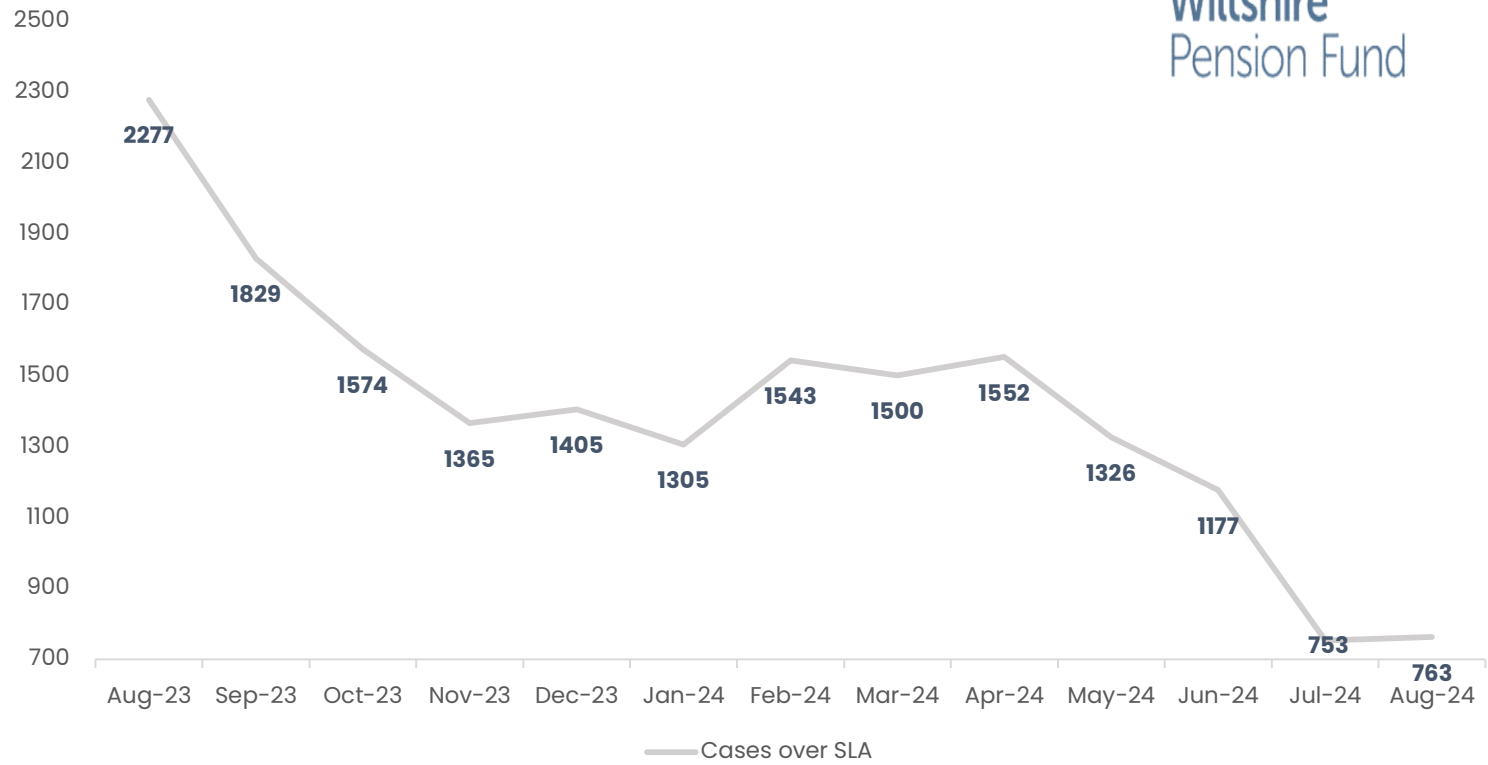
Priority level	Process	Age analysis (working days)							Total
		1-40	2-6 months	6-12months	1year +	2year +	3year +	4 year +	
High	Deaths	47	0	3	0	0	0	0	50
High	Retirements	224	10	2	1	0	0	0	237
High	Refunds	0	0	0	0	0	0	0	0
High	Complaints	0	0	0	0	0	0	0	0
Medium	Transfers Out	108	12	0	0	0	0	0	120
Medium	Transfers In	7	5	0	0	0	0	0	12
Medium	Aggregation	308	571	161	22	33	14	0	1109
Medium	Leavers	212	1	1	4	1	0	0	219
Medium	Divorce	20	1	0	0	0	0	0	21
Medium	General	80	57	5	1	1	0	0	144
Low	Starters	0	0	0	0	0	0	0	0
	Total	1006	657	172	28	35	14	0	1912

*The leaver and aggregation scores are reliant on bringing case numbers down and therefore the existing KPI target scores are likely to worsen while older cases are cleared. With Officers and working on aggregations we can see that this is starting to have an impact on the statistics.

Comparison of cases completed in period vs cases received



Open cases over SLA



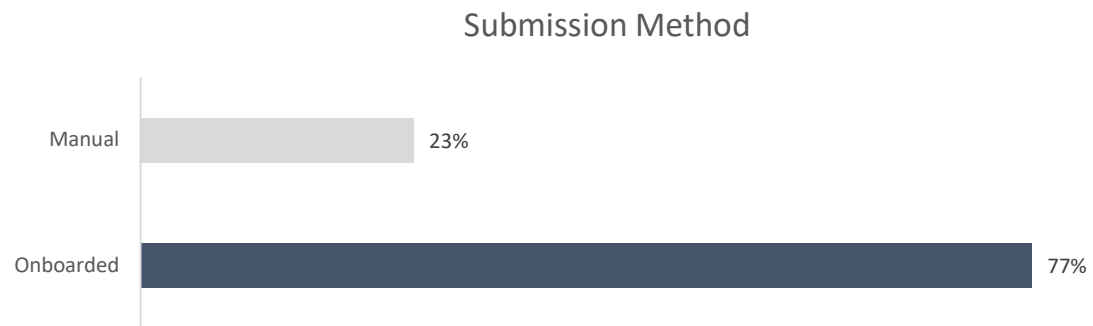
*August 2024 onwards includes all cases including cases on reply due



4. i-Connect onboarding progress figures at end of period

* I-Connect onboarding resumed with effect from 01/02/2024*

Manual Submissions	42	23%
Onboarded	137	77%
Total	179	100%



5. MSS (My Wiltshire Pension) take up

	Active	Deferred	Total
Registered	13,005	14,628	27,633
Percentage	47%	53%	100%

*Excludes members with password resets or disabled account.

Internal targets – Employers



6. i-Connect submission performance – as at 31/08/2024

Size of Scheme	Jun			Jul			Aug		
	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target
Small	16	78	17%	22	85	21%	21	71	23%
Medium	0	12	0%	1	9	10%	1	10	9%
Large	0	2	0%	1	11	8%	0	71	0%
Total	16	92	15%	24	105	19%	22	152	13%

*size of scheme – small <250members, medium 250 members +, large >1000 members

*Newly onboarded employers are not included with the performance statistics as typically more support is needed in the initial months and therefore the normal deadlines do not apply.

*All employers onboarded on to i-Connect are required to submit their return by the 10th of the month following the month the data relates to.

*Figures pulled within the period required for the report - any submissions outside these dates will not be included

tPR Data performance measures

The Pension Regulator (tPR) helps regulate each LGPS's Fund compliance with various legislation. In respect of administrative performance, tPR focuses on Common and Conditional data measures. The Fund is required to submit its scores against these measures each year as part of its Scheme Return

98

tPR Common Data

Percentage score at 05 September 2024

Common Data various data measures it expects all Pension Funds to hold (e.g., name, address etc).

97

tPR Conditional Data

Percentage score at 05 September 2024

Conditional/Scheme Specific data scores are those data types which are needed for the administration of that specific scheme. For the LGPS, the Scheme Advisory Board (SAB) has determined the relevant data items.

96.8

Active Annual Benefit Statements (ABS)

Percentage score at 31 August 2024

*The Fund is required under the LGPS Regulations to produce active ABSs by the 31 August of each year The Fund currently uploads all ABS to the member portal. *stats for available data**

Pension Saving Statements

Percentage score at 31 August 2024 – data not yet available

All Pension Saving Statements for members with of Pension Input amount greater than £50,000 for the 2023/24 tax year will be sent prior to 5th October. We are currently liaising with employers to obtain the final pay data for the affected members to enable us to finalise the calculations.