

Appendix 3 – Administration KPIs

An analysis of the administrative performance over the period

1 July 2024 – 30 September 2024



Internally set targets

The Fund's internally set administration targets are set to help meet 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 July 2024 to 30 September 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%	326	0	326	579	574	331	●	91%
High	Retirements	10/20 days	95%	378	0	378	933	911	400	●	43%
High	Refund	10 days	95%	2	14	2	232	220	14	●	99%
High	Complaints	5/46 Days	95%	4	0	4	2	5	1	●	60%
Medium	Transfer Out	10/20 days	90%	231	123	231	389	376	244	●	63%
Medium	Transfer In	10/15/20 days	90%	27	0	27	71	72	26	●	55%
Medium	Aggregation	23 days – 1 year	90%	1453	0	1453	793	651	1595	●	69%
Medium	Leaver	23 days – 46 days	90%	306	258	306	2446	2052	700	●	97%
Medium	Divorce	20 – 25 days	90%	21	9	21	67	68	20	●	83%
Medium	General	5/10/46/69 Days	90%	570	116	570	1400	1676	294	●	55%
Low	Starters	46 Days	80%	0	1	0	1799	1799	0	●	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 and amber within 5%

Process	Reply Due	In Office	Of which: Currently within SLA	Of which: Already beyond SLA
Deaths	254	77	284	47
Retirements	161	239	319	81
Refund	12	2	14	0
Complaints	1	0	0	1
Transfer Out	90	154	188	56
Transfer In	11	15	20	6
Aggregation	456	1139	1127	468
Leaver	173	527	654	46
Divorce	4	16	18	2
General	128	166	225	69
Starters	0	0	0	0
General - ABS	1	0	0	1
Total	1291	2335	2849	777

*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 QTR4 Oct – Dec 2023	Yearly QTR1Jan – Mar 2024	Yearly QTR2Apr – Jun 2024	Yearly QTR3Jul – Sep 2024	July	August	September
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	Completed on target
High	Deaths	5/10/20 days	95%	92%	77%	77%	91%	91%	93%	90%
High	Retirements	10/20 days	95%	70%	55%	63%	43%	75%	73%	46%
High	Refunds	10 days	95%	100%	99%	99%	99%	99%	99%	100%
High	Complaints	5/46 Days	95%					50%	100%	
Medium	Transfers Out	10/20 days	90%	66%	52%	68%	63%	53%	76%	65%
Medium	Transfers In	10/15/20 days	90%	68%	60%	44%	72%	64%	50%	81%
Medium	Aggregations	23 days – 1 year	90%	83%	77%	68%	67%	56%	64%	90%
Medium	Leavers	23 days – 46 days	90%	79%	84%	79%	97%	98%	95%	95%
Medium	Divorce	20 – 25 days	90%	80%	73%	66%	91%	81%	95%	100%
Medium	General	5/10/46/69 Days	90%			74%	80%	78%	75%	90%
Low	Starters	46 Days	80%			100%	100%	100%	100%	100%
Low	General – ABS	47 Days	80%				100%		100%	

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

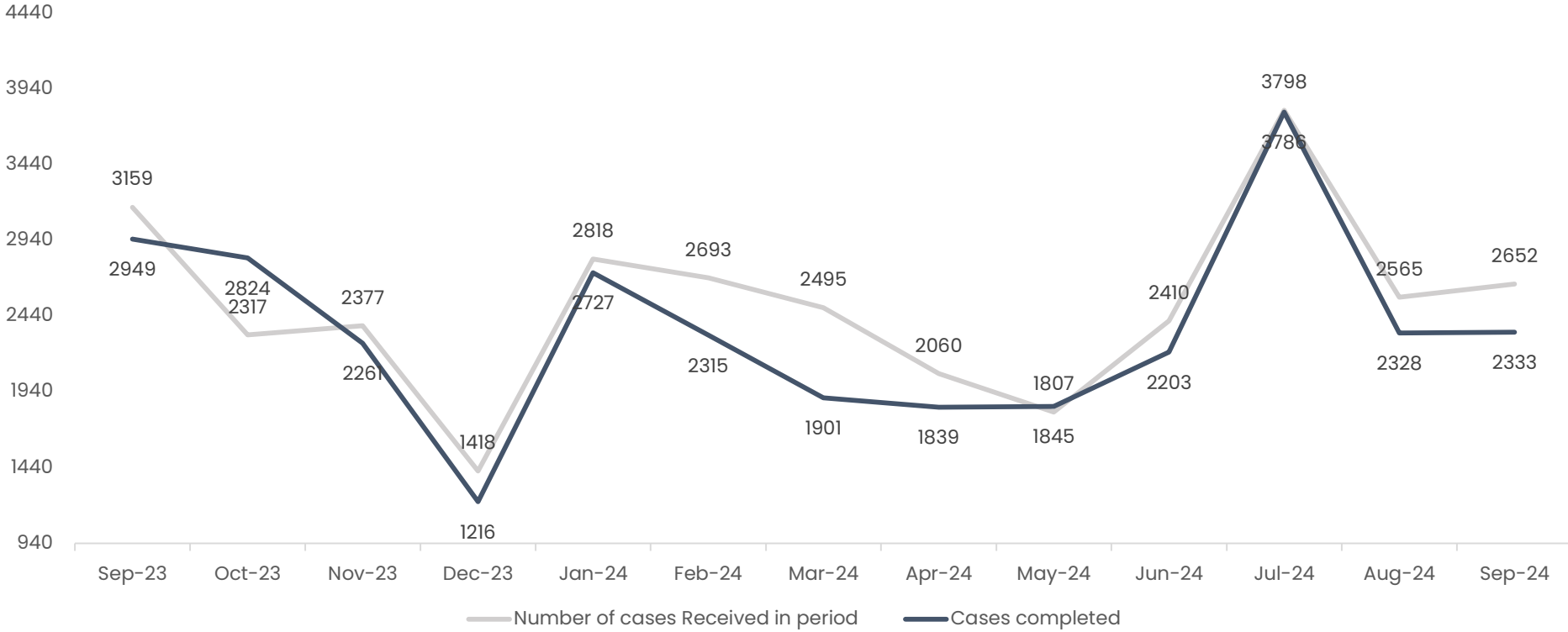
Table 3: 'In Office' (as at 30 September 2024)

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

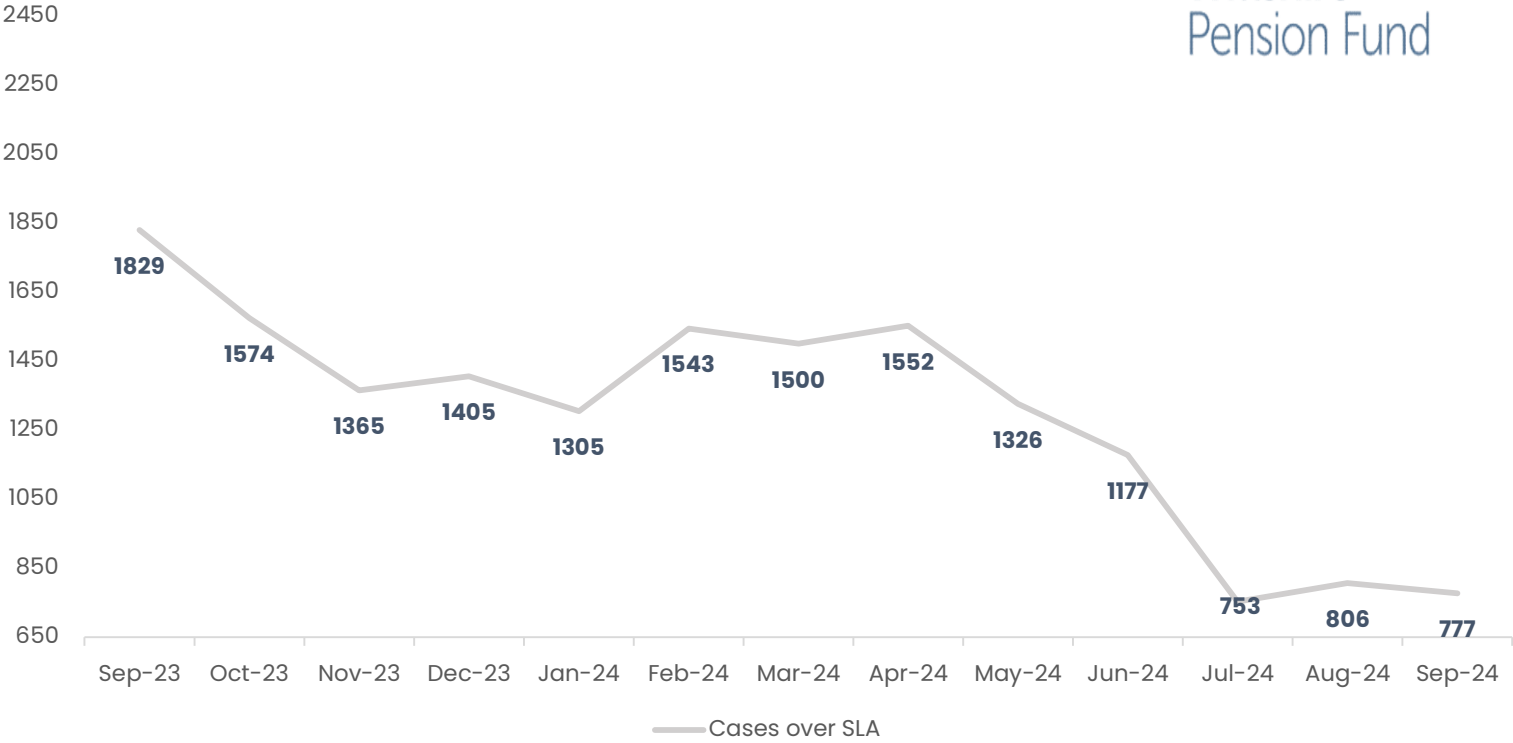
Priority level	Process	Age analysis (working days)							Total
		1-40	2-6 months	6-12months	1year +	2year +	3year +	4 year +	
High	Deaths	74	1	2	0	0	0	0	77
High	Retirements	223	11	4	1	0	0	0	239
High	Refunds	2	0	0	0	0	0	0	2
High	Complaints	0	0	0	0	0	0	0	0
Medium	Transfers Out	140	14	0	0	0	0	0	154
Medium	Transfers In	15	0	0	0	0	0	0	15
Medium	Aggregations	294	636	180	9	6	14	0	1139
Medium	Leavers	518	4	1	3	1	0	0	527
Medium	Divorce	15	1	0	0	0	0	0	16
Medium	General	150	13	1	1	1	0	0	166
Low	Starters	0	0	0	0	0	0	0	0
Low	General - ABS	0	0	0	0	0	0	0	0
	Total	1431	680	188	14	8	14	0	2335

*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



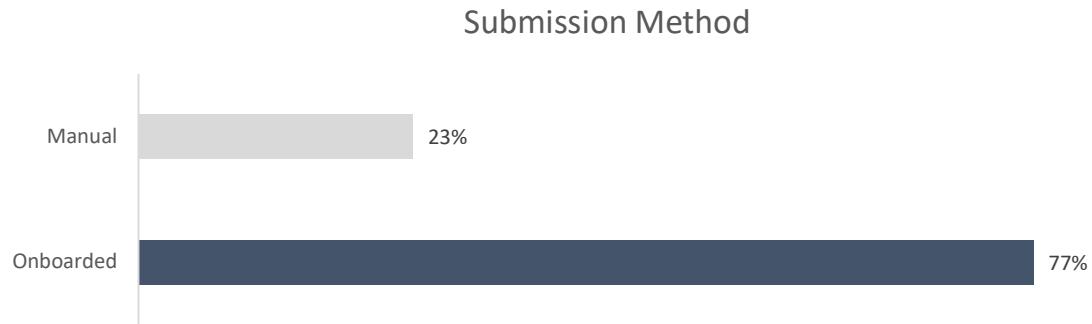
*August 2024 onwards includes all cases including cases on reply due



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	12,917	14,699	27,616
Percentage	47%	53%	100%

*Excludes members with password resets or disabled account.

Internal targets - Employers



6. i-Connect submission performance - as at 30/09/2024

Size of Scheme	Jul			Aug			Sep		
	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target
Small	110	26	81%	108	26	81%	64	0	100%
Medium	9	3	75%	8	4	67%	2	0	100%
Large	4	6	40%	2	6	25%	2	0	100%
Total	123	35	78%	118	36	77%	68	0	100%

*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 30 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 30 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 September 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**

100

Pension Saving Statements

Percentage score at 30 September 2024.

All Pension Saving Statements for members with of Pension Input amount greater than £40,000 for the 2023/24 tax year were sent prior to the deadline of 5th October. 10 members had a Pension Input Amount greater than the Annual Allowance of £60,000.