

AGENDA SUPPLEMENT (1)

Meeting: Local Pension Board

Place: Salisbury Room - County Hall, Bythesea Road, Trowbridge, BA14 8JN

Date: Monday 23 September 2024

Time: 10.00 am

The Agenda for the above meeting was published on 13 September 2024. Additional documents are now available and are attached to this Agenda Supplement.

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Press enquiries to Communications on direct lines (01225)713114/713115.

This Agenda and all the documents referred to within it are available on the Council's website at www.wiltshire.gov.uk

9 **Headlines & Monitoring (HAM) Report** *(Pages 3 - 12)*

Appendix 4b – Internally Set Targets

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| DATE OF PUBLICATION: 18 September 2024 |
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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 3 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

| Priority Category | Process | SLA (Working days) | Target KPI | Financial | Financial | Yearly | Yearly | July | August |
|-------------------|---------------|--------------------|------------|----------------------|---------------------|---------------------|---------------------|------|--------|
| | | | | QTR3 Jul - Sept 2023 | QTR4 Oct - Dec 2023 | QTR1 Jan - Mar 2024 | QTR2 Apr - Jun 2024 | | |
| 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

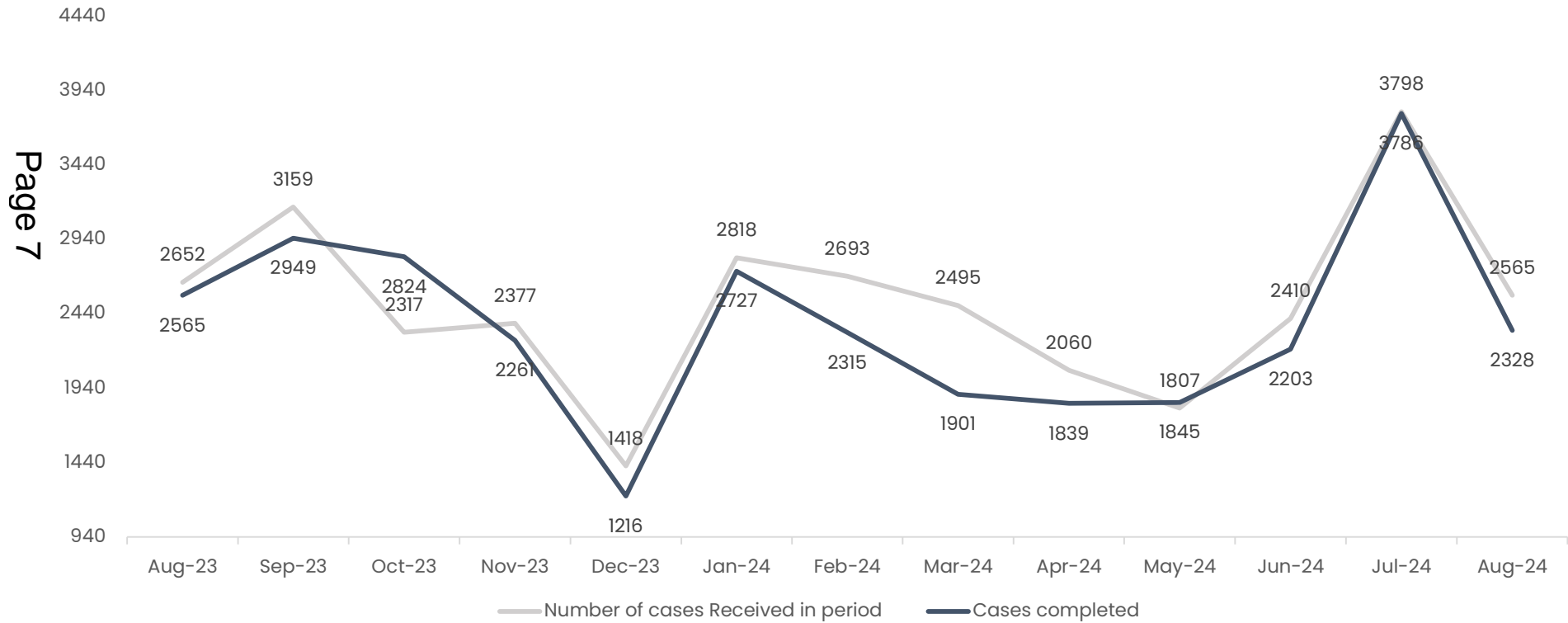
Table 3: 'In Office' (as at 31 August 2024)

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

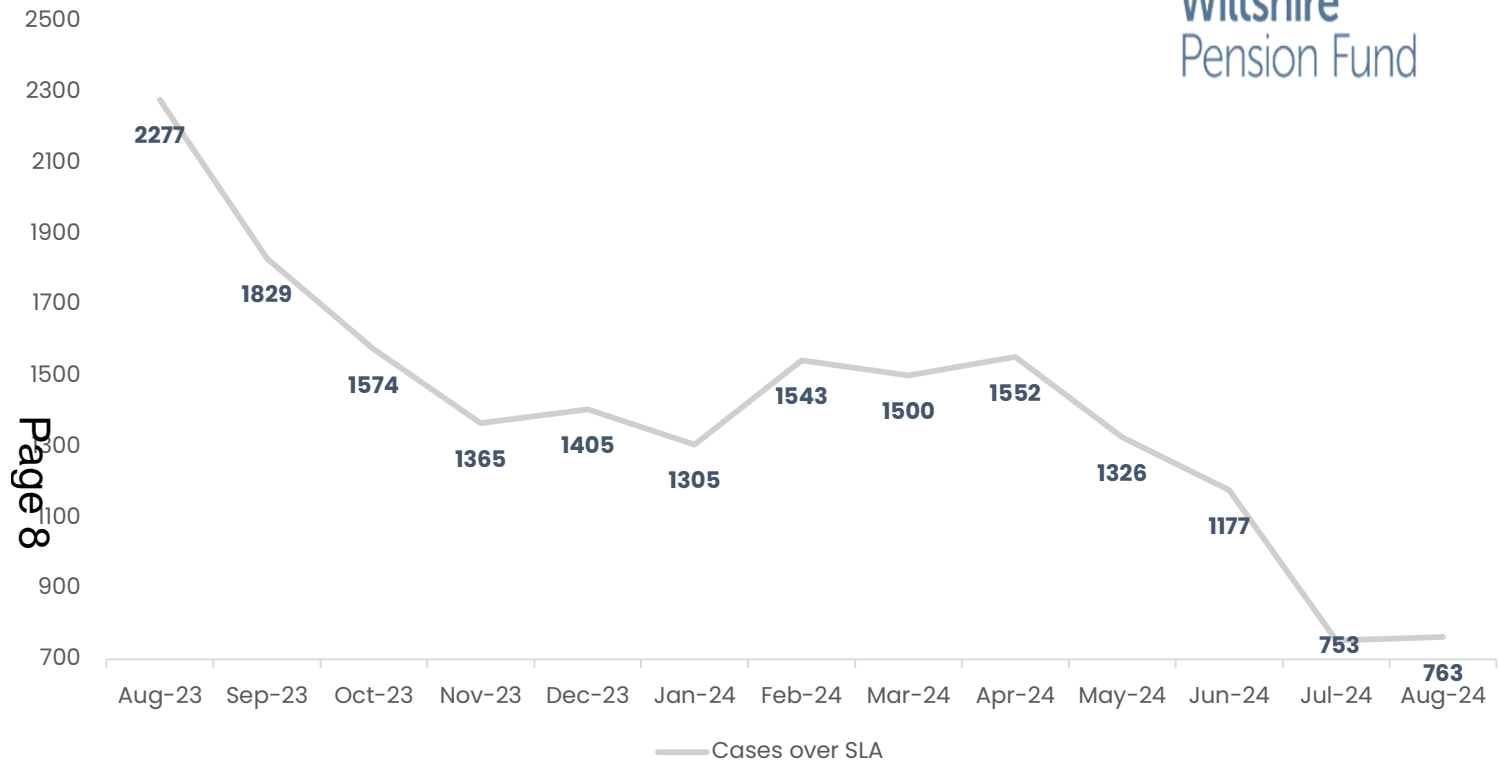
| Priority Level | Process | Age analysis (working days) | | | | | | | Total |
|----------------|---------------|-----------------------------|------------|------------|-----------|-----------|-----------|----------|-------------|
| | | 1-40 | 2-6 months | 6-12months | 1year + | 2year + | 3year + | 4 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



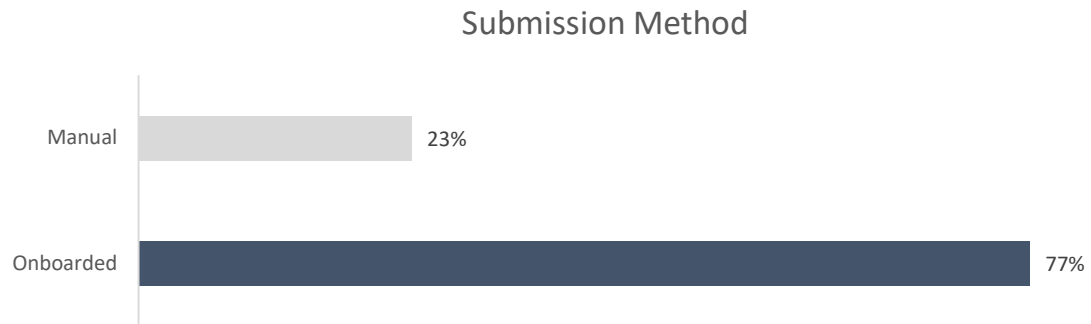
*August 2024 onwards includes all cases including cases on reply due



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% |

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*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.

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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.

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