

# KPI Improvement Plan

Checkpoint Update – 31/08/2024

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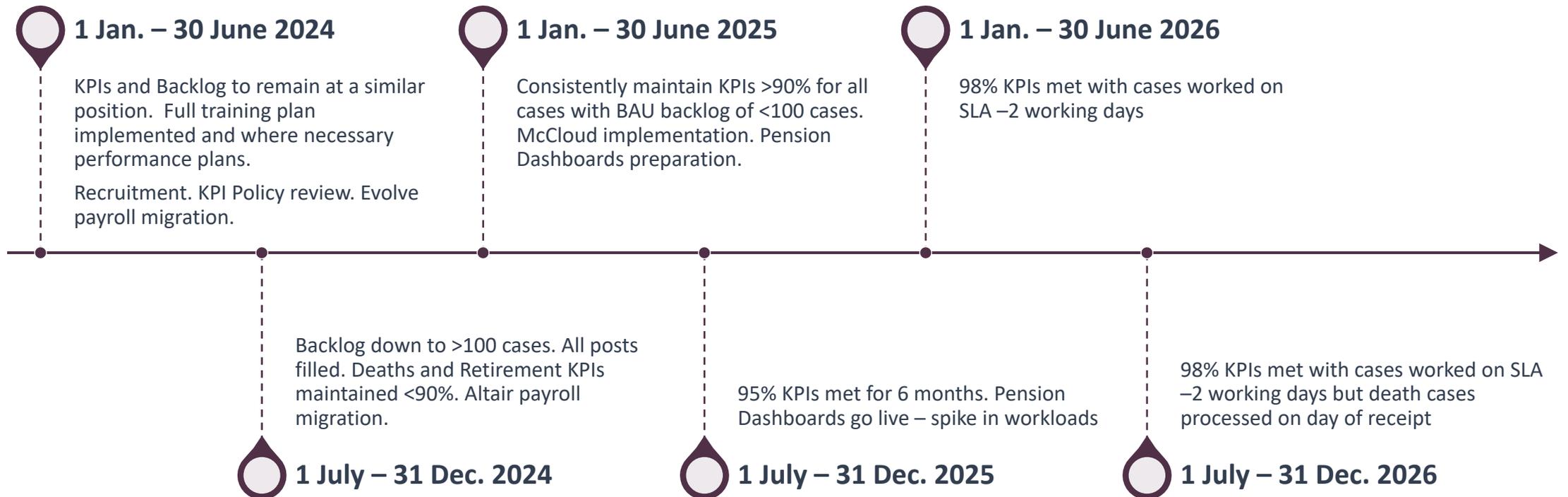
Pension Administration Lead

Wiltshire Pension Fund

# Backlog at December 2023



# Where we expect to be if we take proposed actions



# Where are we now

- Recruitment
- Evolve Payroll Migration
- Training and Performance Plans
- Administration Strategy
- KPI and Backlog update

# Administration Recruitment

## Vacancies Filled:

- Member Services Manager
- Employer Services Manager
- Work Management Officer – Employer Services – Sian Shephard – Internal
- Member Services Officers:
  - Senior Member Services Officer x2
  - Member Services Officers x 2
  - Pensions Assistant – Suzanne Taylor

## Current Vacancies:

- Quality Assurance Lead
- Employer Liaison Officer (new role)
- Member Services Officer
- Employer Services Officer

# Evolve Payroll Migration

- SAP migrated to Oracle on 25 April
- Monthly payroll reports are now received around 2 weeks later than pre migration
- April, May and June iConnect submissions were late causing delays in, New Starters, Leaver and Retirement. This affected WC employers and 18 other employers where WC provide payroll support
- AVC submission to Prudential for April, May and June were late. Contributions were paid but Prudential were unable to invest or disinvest funds. This affected Retirements and Transfer Outs. May have caused investment losses for members.

# Training and Performance Plans

- Individual training plans in place for all officers
- Training has been undertaken for all key processes
- Training in respect of legislation changes regarding the Lifetime Allowance changes and McCloud
- Vulnerable person training conducted the Samaritans
- Performance Improvements Plan have been or are currently in place for 3 officers
- Over 700 hours have been logged as training

# Administration Strategy

Not yet fully drafted due the reasons mentioned above.

Key changes:

- Improved and clearer KPIs for administration tasks and exceeds stator minimum standards – see next slide
- Appendices will become an integral part of the document
- Employer Service Level Agreement will be broadly similar
- Escalation policy will be simplified, charging and reporting policy to be followed in line with other administering authorities.

# Proposed Administration KPIs

Task Type	Expected Service Level
New Entrant	10 Working Days on receipt of data from employer
Leaving Service Information (non-Retirement)	10 Working Days on receipt of data from employer
Retirement Estimate	10 Working Days following request
Retirement Settlement	5 Workings Days following notification
Transfers In Query	10 Working Days following request
Transfer In Settlement	5 Working Days following receipt of payment
Transfer Out Estimate in Divorces	10 Working Days following request
Transfer Out Payment	5 Working Days following receipt of forms
Initial Death Notification	5 Workings Days following notification
Death Settlement	5 Working Days following receipt of forms
Pension Sharing Order Settlement	10 Working Days following receipt of forms
General Enquiries	15 Working Days following request
Change of Details	10 Working Days following request

Moving from a case basis to a transaction basis. We will be reporting on every stage of the interaction with members and employers which will provide more accurate reflection of our service delivery.

## KPI and Backlog Update

### Cases over SLA- Committee Categories

1,137 (Nov-23)

824 (June -24)

465 (Aug-24)

All cases  
1,177 (June-24)

806 (Aug-24)

### Frozen refunds

4,533 (Nov – 23)

235 (June -24)

250 (Aug -24)

### Members 75 or over

Active – 11

Deferred – 58

Status 2  
(undecided  
leaver) – 6

### Status 2 (undecided leaver)

1,066 (Nov - 23)

30 (June – 24)

512 (Aug -24)

### Hidden aggregation backlog

Approx.400 (Nov  
- 23)

499 (June – 24)

104 (Aug-24)

### Old deaths within SLA but on reply due for >2 months

214 (Nov – 23)

176 (June – 24)

164 (Aug – 24)

# KPI and Backlog reporting

- Currently reporting only high and medium Cases and n Office cases
- Doesn't include low priority cases, General Enquiries and New Starters and cases on Reply Due
- The current backlog of all cases as at 30 June 2024 is 1177 down from 1,318 as December 2023. As at 31 August this was 806.
- The current KPI percentage for all cases as at 30 June 2024 is 79% and 84.49% as August 2024.
- Going forward all reports will include all cases types
- This doesn't affect the backlog target for the end of 2024

# 1 June 2024 to 31 December 2024

- The total backlog (all case types) to be less than 100
- Remaining vacancies to be filled
- Death and Retirement KPIs greater than 90%
- Oracle to Altair migration



Questions

