Appendix 3 - Administration KPIs

An analysis of the adminisrative performance over the period

1 August 2024 - 31 October 2024

Wiltshire Pension Fund

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 August 2024 to 31 October 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%	298	0	298	441	420	319	🔴	89%
High	Retirements	10/20 days	95%	329	0	329	916	877	368	🔴	38%
High	Refund	10 days	95%	16	14	16	217	225	8	🟢	100%
High	Complaints	5/46 Days	95%	3	0	3	2	3	2	🟢	67%
Medium	Transfer Out	10/20 days	90%	179	140	179	369	321	227	🔴	70%
Medium	Transfer In	10/15/20 days	90%	11	0	11	70	66	15	🔴	63%
Medium	Aggregation	23 days - 1 year	90%	1306	0	1306	769	595	1480	🔴	74%
Medium	Leaver	23 days - 46 days	90%	365	297	365	2469	2240	594	🔴	97%
Medium	Divorce	20 - 25 days	90%	17	13	17	52	50	19	🔴	86%
Medium	General	5/10/46/69 Days	90%	420	105	420	1451	1660	211	🟢	54%
Low	Starters	46 Days	80%	0	2	0	1812	1812	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	293	26	303	16
Retirements	263	105	323	45
Refund	8	0	7	1
Complaints	2	0	0	2
Transfer Out	132	95	194	33
Transfer In	11	4	13	2
Aggregation	552	928	1189	291
Leaver	389	205	552	42
Divorce	13	6	14	5
General	178	33	198	13
Starters	0	0	0	0
General - ABS	1	0	0	1
Total	**1842**	**1402**	**2793**	**451**

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*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

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Priority Category	Process	SLA (Working days)	Target KPI	Financial QTR4 Oct – Dec 2023 Completed on target	Yearly QTR1Jan – Mar 2024 Completed on target	Yearly QTR2Apr – Jun 2024 Completed on target	Yearly QTR3Jul – Sep 2024 Completed on target	August Completed on target	September Completed on target	October Completed on target
High	Deaths	5/10/20 days	95%	92%	77%	77%	91%	93%	90%	82%
High	Retirements	10/20 days	95%	70%	55%	63%	43%	73%	46%	37%
High	Refunds	10 days	95%	100%	99%	99%	99%	99%	100%	100%
High	Complaints	5/46 Days	95%					100%		0
Medium	Transfers Out	10/20 days	90%	66%	52%	68%	63%	76%	65%	69%
Medium	Transfers In	10/15/20 days	90%	68%	60%	44%	72%	50%	81%	88%
Medium	Aggregations	23 days – 1 year	90%	83%	77%	68%	67%	64%	90%	71%
Medium	Leavers	23 days – 46 days	90%	79%	84%	79%	97%	95%	95%	97%
Medium	Divorce	20 – 25 days	90%	80%	73%	66%	91%	95%	100%	88%
Medium	General	5/10/46/69 Days	90%			74%	80%	75%	90%	87%
Low	Starters	46 Days	80%			100%	100%	100%	100%	100%
Low	General – ABS	47 Days	80%				100%	100%		0

*red alert shown for anything below 10% of target KPI
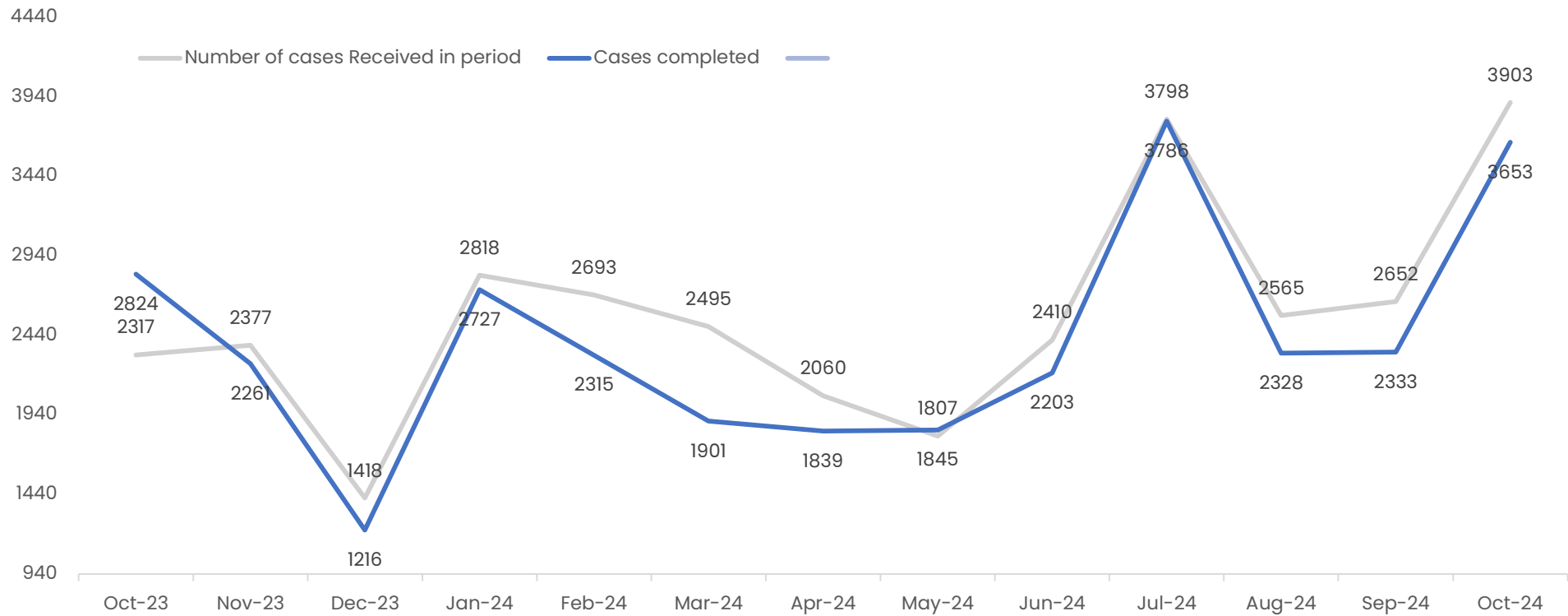
Complted 25/11/2024

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

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

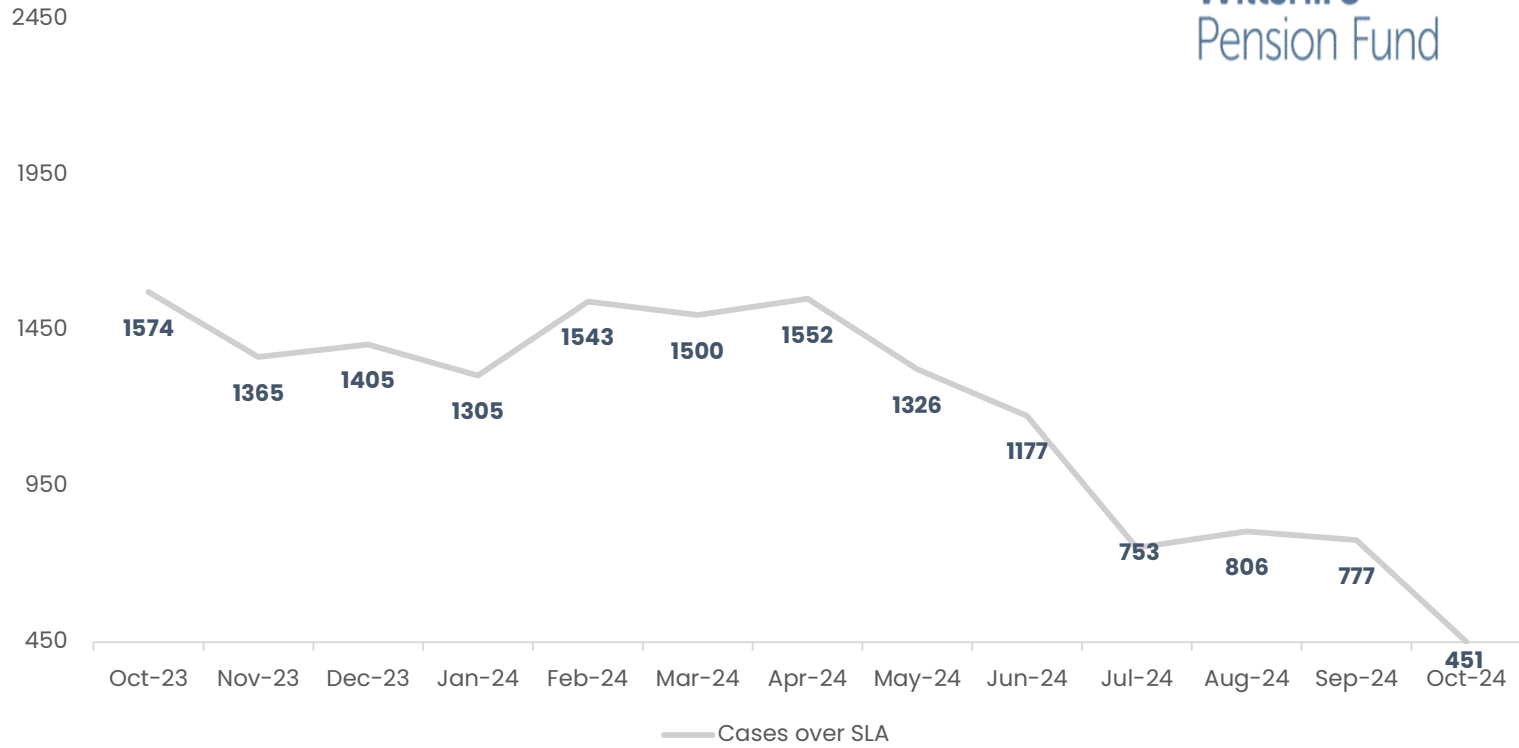| Priority level	Process	Age analysis (working days)							
		1-40	2-6 months	6-12months	1year +	2year +	3year +	4 year +	Total
High	Deaths	25	0	1	0	0	0	0	26
High	Retirements	95	8	1	0	1	0	0	105
High	Refunds	0	0	0	0	0	0	0	0
High	Complaints	0	0	0	0	0	0	0	0
Medium	Transfers Out	84	11	0	0	0	0	0	95
Medium	Transfers In	4	0	0	0	0	0	0	4
Medium	Aggregations	263	524	129	4	4	4	0	928
Medium	Leavers	204	1	0	0	0	0	0	205
Medium	Divorce	4	2	0	0	0	0	0	6
Medium	General	31	2	0	0	0	0	0	33
Low	Starters	0	0	0	0	0	0	0	0
Low	General - ABS	0	0	0	0	0	0	0	0
	Total	710	548	131	4	5	4	0	1402

*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

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Legend: Number of cases Received in period — Cases completed

Month	Number of cases Received in period	Cases completed
Oct-23	2317	2824
Nov-23	2377	2261
Dec-23	1418	1216
Jan-24	2818	2727
Feb-24	2693	2315
Mar-24	2495	1901
Apr-24	2060	1839
May-24	1807	1845
Jun-24	2410	2203
Jul-24	3798	3786
Aug-24	2565	2328
Sep-24	2652	2333
Oct-24	3903	3653

Open cases over SLA

Cases over SLA data points:
- Oct-23: 1574
- Nov-23: 1365
- Dec-23: 1405
- Jan-24: 1305
- Feb-24: 1543
- Mar-24: 1500
- Apr-24: 1552
- May-24: 1326
- Jun-24: 1177
- Jul-24: 753
- Aug-24: 806
- Sep-24: 777
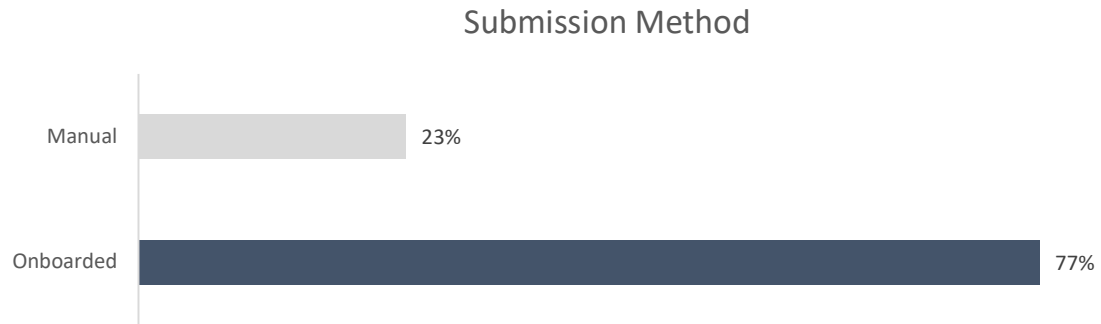- Oct-24: 451

Legend: —— 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 Submissoins	138	23%
Onboarded	41	77%
Total	179	100%

Submission Method

Manual	23%
Onboarded	77%

5. MSS (My Wiltshire Pension) take up

	Active	Deferred	Total
Registered	13,105	14,911	28,016
Percentage	47%	53%	100%

*Excludes members with password resets or disabled account.

Internal targets - Employers

completed 27/11/2024

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Size of Scheme	Aug			Sep			Oct		
	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target
Small	72	23	76%	85	14	86%	79	20	80%
Medium	7	3	70%	6	5	55%	8	3	73%
Large	1	4	20%	2	3	40%	1	20	5%
Total	**80**	**30**	**73%**	**93**	**22**	**81%**	**88**	**43**	**67%**

*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 31 October 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 31 October 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 October 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 31 October 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.