

Appendix 3 – Administration KPIs

An analysis of the administrative performance over the period

1 October 2024 – 31 December 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 October 2024 to 31 December 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%	295	0	295	442	361	376		86%
High	Retirements	10/20 days	95%	309	0	309	790	762	337		45%
High	Refund	10 days	95%	7	16	7	140	146	1		100%
High	Complaints	5/46 Days	95%	1	0	1	4	1	4		0%
Medium	Transfer Out	10/20 days	90%	175	158	175	360	311	224		70%
Medium	Transfer In	10/15/20 days	90%	10	0	10	50	38	22		74%
Medium	Aggregation	23 days - 1 year	90%	1319	0	1319	787	652	1454		66%
Medium	Leaver	23 days - 46 days	90%	588	350	588	2477	2571	494		98%
Medium	Divorce	20 - 25 days	90%	17	8	17	30	32	15		89%
Medium	General	5/10/46/69 Days	90%	251	107	251	1363	1389	225		57%
Medium	General - i-Connect change	5 days	80%	0	143	0	229	228	1		40%
Low	Starters	46 Days	80%	0	1	0	2472	2472	0		100%
Low	General - ABS	1/5 Days	80%	1	0	1	0	0	1		0%

*red alert shown for anything below 10% of tolerable performance and amber within 5%

Process	Reply Due	In Office	Of which: Currently	Of which: Already beyond
Deaths	344	32	344	32
Retirements	190	147	270	67
Refund	1	0	1	0
Complaints	1	3	0	4
Transfer Out	76	148	184	40
Transfer In	13	9	18	4
Aggregation	557	897	1278	176
Leaver	352	142	449	45
Divorce	11	4	15	0
General	205	20	212	13
General - i-Connect changes	1	0	1	0
Starters	0	0	0	0
General - ABS	1	0	0	1
Total	1752	1402	2772	382

*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

				Yearly QTR1Jan - Mar 2024	Yearly QTR2Apr - Jun 2024	Yearly QTR3Jul - Sep 2024	Yearly QTR4Oct - Dec2024	October	November	December
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%	77%	77%	91%	86%	82%	84%	91%
High	Retirements	10/20 days	95%	55%	63%	43%	45%	37%	48%	51%
High	Refunds	10 days	95%	99%	99%	99%	100%	100%	100%	100%
High	Complaints	5/46 Days	95%				0%	0%	50%	0%
Medium	Transfers Out	10/20 days	90%	52%	68%	63%	70%	69%	73%	68%
Medium	Transfers In	10/15/20 days	90%	60%	44%	72%	84%	88%	50%	93%
Medium	Aggregations	23 days - 1 year	90%	77%	68%	67%	67%	71%	76%	55%
Medium	Leavers	23 days - 46 days	90%	84%	79%	97%	97%	97%	95%	97%
Medium	Divorce	20 - 25 days	90%	73%	66%	91%	69%	88%	64%	62%
Medium	General	5/10/46/69 Days	90%		74%	80%	91%	87%	92%	94%
Medium	General - i- Connect changes	5 Days	80%				40%		30%	44%
Low	Starters	46 Days	80%		100%	100%	100%	100%	100%	100%
Low	General - ABS	47 Days	80%			100%	0%	0%	0%	0%

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

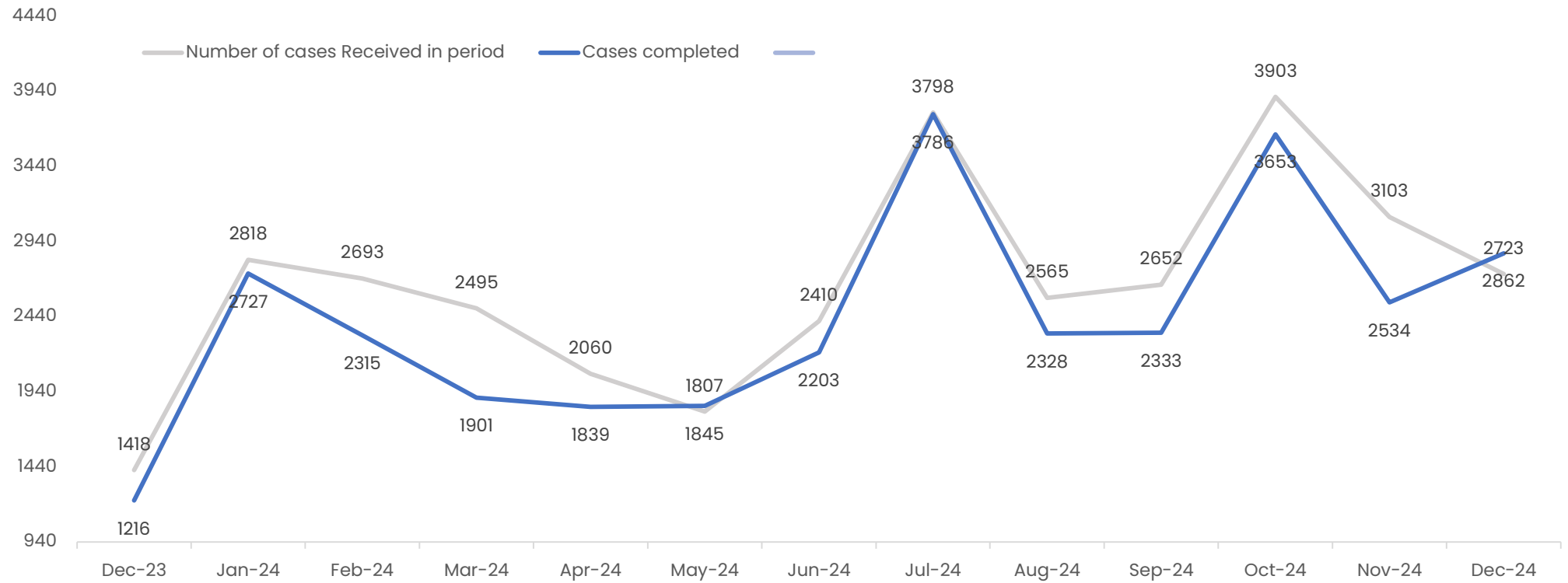
Table 3: 'In Office' (as at 31 December 2024)

*'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	31	0	0	1	0	0	0	32
High	Retirements	130	14	1	0	2	0	0	147
High	Refunds	0	0	0	0	0	0	0	0
High	Complaints	3	0	0	0	0	0	0	3
Medium	Transfers Out	136	12	0	0	0	0	0	148
Medium	Transfers In	7	2	0	0	0	0	0	9
Medium	Aggregations	288	412	188	2	3	4	0	897
Medium	Leavers	139	2	0	1	0	0	0	142
Medium	Divorce	4	0	0	0	0	0	0	4
Medium	General	16	3	1	0	0	0	0	20
Low	Starters	0	0	0	0	0	0	0	0
Low	General - ABS	0	0	0	0	0	0	0	0
	Total	754	445	190	4	5	4	0	1402

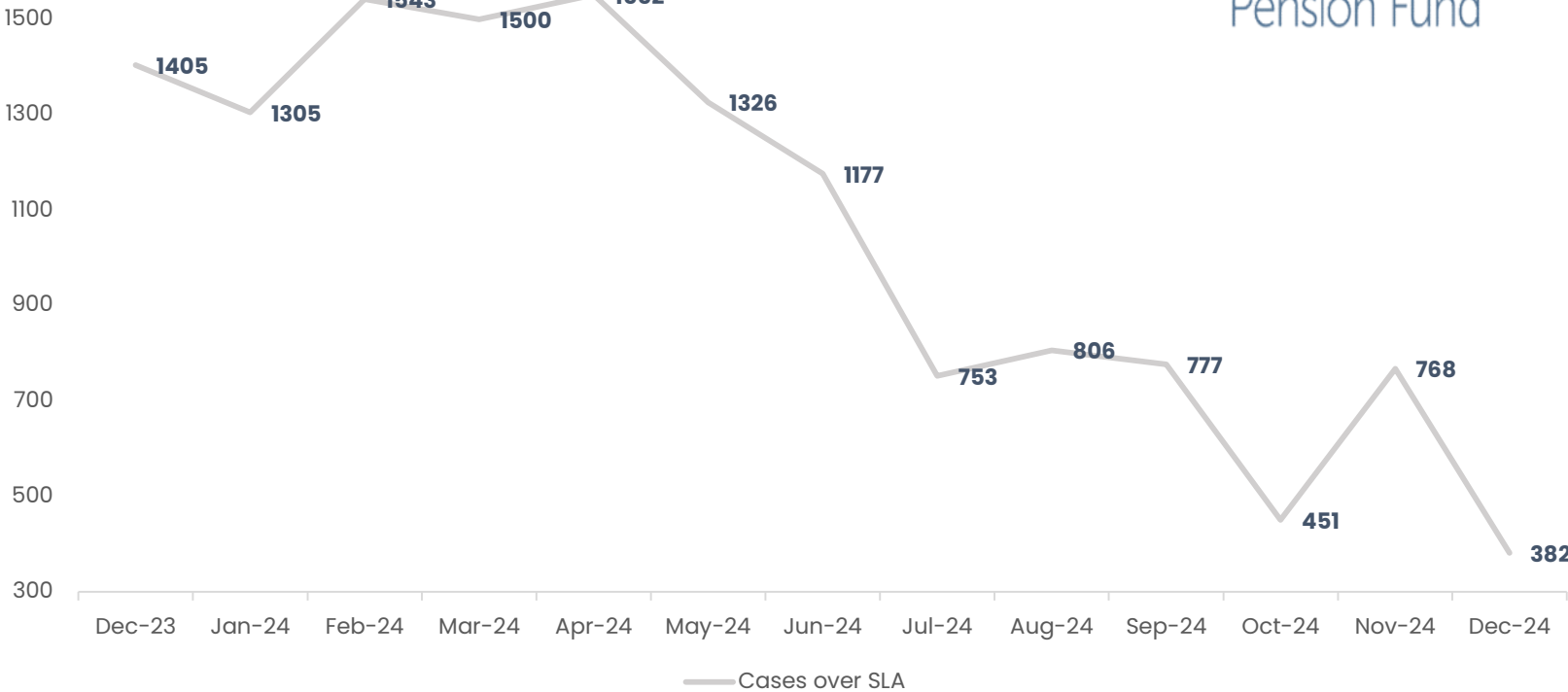
*The leaver and aggregation scores are reliant on bringing case numbers down and therefore the existing KPI target scores are likely to worsen while older cases are cleared. With Officers and working on aggregations we can see that this is starting to have an impact on the statistics.

Comparison of cases completed in period vs cases received





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	26	15%
Onboarded	153	85%
Total	179	100%



5. MSS (My Wiltshire Pension) take up

	Active	Deferred	Total
Registered	13,427	15,045	28,472
Percentage	47%	53%	100%

*Excludes members with password resets or disabled account.

Internal targets - Employers



6. i-Connect submission performance - as at 22/01/2025

Size of Scheme	Oct			Nov			Dec		
	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target	On-time	Late	Submitted on Target
Small	79	21	79%	83	18	82%	74	24	76%
Medium	8	3	73%	9	2	82%	5	6	45%
Large	1	4	20%	3	2	60%	3	24	11%
Total	88	28	76%	95	22	81%	82	54	60%

*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

95

tPR Common Data

Percentage score at 23 January 2025

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

97

tPR Conditional Data

Percentage score at 23 January 2025

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 23 January 2025

*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 23 January 2025.

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.