

PENSION ADMINISTRATION PERFORMANCE 2013/14

In accordance with the Pension Administration Strategy, approved 13 June 2012, the following performance measures have been compared against the targets set within the said strategy document.

Employer Performance Measures

Service Standards

Standard – target completion 90%	Volume	%age Met
New starts notification – within 20 working days	482	100%
Changes notified – within 20 working days	873	100%
Retirement info – at least 20 working days before	178	100%
Early leaver notification – within 20 working days	320	100%
Death in service notification – within 10 working days	5	100%
Query responses – within 10 working days	See below	
Year-end queries – within 20 working days	See below	

The way in which information has been recorded for queries has not been sufficient to allow for the collection and comparison against targets for a full year in 2013/14. Improved recording procedures have been developed to allow for this measure to be completed going forward, however, this is only be for a partial year within the 2013/14 final accounts.

Contribution Payments

The following tables compare the date contribution payments are received against the target date for each of the Scheduled and Active Admitted Bodies.

Scottish Borders Council

	Target Date	Date received	Target Achieved
April	30/04/2013	30/04/2013	On Time
May	31/05/2013	31/05/2013	On Time
June	30/06/2013	30/06/2013	On Time
July	31/07/2013	31/07/2013	On Time
August	30/08/2013	30/08/2013	On Time
September	30/09/2013	30/09/2013	On Time
October	31/10/2013	31/10/2013	On Time
November	30/11/2013	30/11/2013	On Time
December	23/12/2013	23/12/2013	On Time
January	24/01/2014	24/01/2014	On Time
February	28/02/2014	28/02/2014	On Time
March	31/03/2014	31/03/2014	On Time

Visit Scotland

	Target Date	Date received	Target Achieved
April	19/05/2013	03/05/2013	On Time
May	19/06/2013	04/06/2013	On Time
June	19/07/2013	05/07/2013	On Time
July	19/08/2013	09/08/2013	On Time
August	19/09/2013	05/09/2013	On Time
September	19/10/2013	07/10/2013	On Time
October	19/11/2013	05/11/2013	On Time
November	19/12/2013	17/12/2013	On Time
December	19/01/2014	02/01/2014	On Time
January	19/02/2014	31/01/2014	On Time
February	19/03/2014	04/03/2014	On Time
March	19/04/2014	28/03/2014	On Time

Borders College

	Target Date	Date received	Target Achieved
April	19/05/2013	03/05/2013	On Time
May	19/06/2013	03/06/2013	On Time
June	19/07/2013	03/07/2013	On Time
July	19/08/2013	02/08/2013	On Time
August	19/09/2013	02/09/2013	On Time
September	19/10/2013	03/10/2013	On Time
October	19/11/2013	04/11/2013	On Time
November	19/12/2013	03/12/2013	On Time
December	19/01/2014	03/01/2014	On Time
January	19/02/2014	03/02/2014	On Time
February	19/03/2014	03/03/2014	On Time
March	19/04/2014	04/04/2014	On Time

Scottish Borders Housing Association

	Target Date	Date received	Target Achieved
April	19/05/2013	17/05/2013	On Time
May	19/06/2013	18/06/2013	On Time
June	19/07/2013	23/07/2013	Late Payment
July	19/08/2013	19/08/2013	On Time
August	19/09/2013	16/09/2013	On Time
September	19/10/2013	14/10/2013	On Time
October	19/11/2013	18/11/2013	On Time
November	19/12/2013	17/12/2013	On Time
December	19/01/2014	21/01/2014	Late Payment
January	19/02/2014	17/02/2014	On Time
February	19/03/2014	17/03/2014	On Time
March	19/04/2014	23/04/2014	Late Payment

Jedburgh Leisure Facilities Trust

	Target Date	Date received	Target Achieved
April	19/05/2013	17/05/2013	On Time
May	19/06/2013	14/06/2013	On Time
June	19/07/2013	15/07/2013	On Time
July	19/08/2013	14/08/2013	On Time
August	19/09/2013	07/10/2013	Late Payment
September	19/10/2013	15/10/2013	On Time
October	19/11/2013	14/11/2013	On Time
November	19/12/2013	18/12/2013	On Time
December	19/01/2014	15/01/2014	On Time
January	19/02/2014	17/02/2014	On Time
February	19/03/2014	17/03/2014	On Time
March	19/04/2014	15/04/2014	On Time

Borders Sport and Leisure Trust

	Target Date	Date received	Target Achieved
April	19/05/2013	17/05/2013	On Time
May	19/06/2013	18/06/2013	On Time
June	19/07/2013	18/07/2013	On Time
July	19/08/2013	16/08/2013	On Time
August	19/09/2013	16/09/2013	On Time
September	19/10/2013	18/10/2013	On Time
October	19/11/2013	18/11/2013	On Time
November	19/12/2013	18/12/2013	On Time
December	19/01/2014	17/01/2014	On Time
January	19/02/2014	19/02/2014	On Time
February	19/03/2014	18/03/2014	On Time
March	19/04/2014	17/04/2014	On Time

AMEY Community Limited

	Target Date	Date received	Target Achieved
April	19/05/2013	17/05/2013	On Time
May	19/06/2013	18/06/2013	On Time
June	19/07/2013	18/07/2013	On Time
July	19/08/2013	16/08/2013	On Time
August	19/09/2013	18/09/2013	On Time
September	19/10/2013	18/10/2013	On Time
October	19/11/2013	18/11/2013	On Time
November	19/12/2013	18/12/2013	On Time
December	19/01/2014	17/01/2014	On Time
January	19/02/2014	19/02/2014	On Time
February	19/03/2014	18/03/2014	On Time
March	19/04/2014	17/04/2014	On Time

The Scheduled/Admitted Bodies who were not complying with the remittance schedules were contacted during the year and remind of their requirement to adhere to the payment schedules. This resulted in an increase in the number of remittances being received timeously. There has been a significant improvement since 2013/14 where there were 10 late payments compared with 4 this year. This continues to be monitored on a monthly basis.

Administering Authority Performance Measures

Service Standards

Standard	Volume	Target	%age Met
Estimates – Transfer In	96	10 days	30.21%
Estimates – Transfer Out	75	10 days	36.00%
Estimate – All Other	849	10 days	89.75%

The way in which information has been recorded for general queries and advice has been enhanced during 2013/14 to allow for a more detailed collection and comparison against targets. However, this was only implemented from September 2013 so represents a partial year, a full year will be included within the 2014/15 final accounts.

Type of Query	Volume	Target	%age Met
Admitted/Scheduled Bodies Employer Queries	23	10 days	100.00%
Advice on AVC applications	21	10 days	100.00%
Advice on Nominations and/or Death Grant	13	10 days	100.00%
Advice on Options at Retirement	57	10 days	100.00%
Annual Benefit Statement Queries	101	20 days	100.00%
Assistance with form completion e.g. retirement declaration	15	10 days	100.00%
Change of Address/Bank Details	60	10 days	100.00%
Divorce	9	10 days	100.00%
DWP requesting details of Pensioner Payments	1	10 days	100.00%
Enquiries in relation to Deceased Pensioners	28	10 days	100.00%
ER/VS general advice	33	10 days	100.00%
Flexible Retirement	22	10 days	100.00%
General advice	36	10 days	100.00%
Internal forms requesting details of Pensioner Payments	6	10 days	100.00%
Opting In to LGPS	41	10 days	100.00%
Opting Out of LGPS	23	10 days	100.00%
Pension Payment queries including tax issues	64	10 days	100.00%
Refunds Enquiry	4	10 days	100.00%
Retiral Enquiry	82	10 days	100.00%
Transfer In Enquiry	4	10 days	100.00%
Transfer Out Enquiry	12	10 days	100.00%
Total	655	10 days	100.00%

Other Measures

Area	Measure	Completed
Employer Liaison Meetings	2 per annum	None
Benefit Statements	by end of October	by end of August 2013

Liaison meetings with all Admitted and Scheduled Bodies were not held during 2013/14. However, we did hold a meeting with Borders College to discuss Auto Enrolment during 2013/14. A schedule of meetings for the coming years will be developed to cover topics such as the LGPS (Scotland) legislative changes scheduled for implementation from 1 April 2015.

All Benefit Statements were prepared during August 2013. Statements for all Scheduled and Admitted Bodies, were issued before the end of August 2013.

Key Administration Tasks

Task	Total received
New entrants	482
Changes	873
Early leavers	320
Retirements	178
Deaths in service	5
Deaths in deferment	5
Deaths in retirement	79
New Widows(ers), Child Pensions	34
Estimates	1,020
Pension credit members	0