

APPENDIX 1

PENSION ADMINISTRATION PERFORMANCE 2018/19

In accordance with the Pension Administration Strategy, approved 13 September 2018, 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	637	100%
Retirement info – at least 20 working days before	227	100%
Early leaver notification – within 20 working days	536	100%
Death in service notification – within 10 working days	12	100%
Query responses – within 5 working days	3,323	99.64%
Year-end queries – within 20 working days	232	99.57%

During 2018/19 Scottish Borders Council implemented a new ERP system, including a payroll module, this led to a marked reduction in performance over this period. As can be demonstrated by the above the performance standards are back to the previous high standard with information being passed to the Pensions Administration Team in accordance with the set standards in all instances.

Contribution Payments

The following tables compare the date contribution payments are received against the target date, of 19th of the month, for each of the Scheduled and Active Admitted Bodies.

Employer Body	By Target Date	Late	% On Time
Scottish Borders Council	12	-	100%
Visit Scotland	12	-	100%
Borders College	12	-	100%
Scottish Borders Housing Association	12	-	100%
Jedburgh Leisure Facilities Trust	9	3	75%
Borders Sport and Leisure Trust	12	-	100%
AMEY Community Limited	12	-	100%
SB Cares	12	-	100%
CGI	12	-	100%

The payments that were made after the target date were all received within a maximum of 4 calendar days. These continue to be monitored on a monthly basis to ensure all bodies continue to comply with the deadlines for payments.

Administering Authority Performance Measures

Service Standards

Standard	Volume	Target	%age Met
Estimates – Transfer In	98	20 days	47.96%
Estimates – Transfer Out	96	20 days	56.25%
Estimate – All Other	1,036	10 days	83.01%

The Pensions Team and members of the HR Shared Services Helpdesk record when they have had contact in relation to Pension be this by email, in person or telephone and the headline reason of the enquiry. The following table summarises the queries received during 2018/19.

Type of Query	Volume	Target	%age Met
Admitted/Scheduled Bodies Employer Queries	118	5 days	99.15%
Advice on AVC applications	61	5 days	98.36%
Advice on Nominations and/or Death Grant	63	5 days	96.83%
Advice on Options at Retirement	162	5 days	100%
Annual Benefit Statement Queries	232	20 days	99.57%
Assistance with form completion e.g. retirement declaration	118	5 days	100%
Change of Address/Bank Details	443	5 days	100%
Divorce	15	5 days	100%
DWP requesting details of Pensioner Payments	43	5 days	100%
Enquiries in relation to Deceased Pensioners	728	5 days	99.45%
ER/VS general advice	21	5 days	100%
Flexible Retirement	98	5 days	100%
General advice	573	5 days	100%
Internal forms requesting details of Pensioner Payments	55	5 days	100%
Opting In to LGPS	67	5 days	100%
Opting Out of LGPS	84	5 days	98.81%
Pension Payment queries including tax issues	175	5 days	100%
Refunds Enquiry	83	5 days	98.80%
Retiral Enquiry	261	5 days	99.23%
Service Breaks	7	5 days	100%
Transfer In Enquiry	92	5 days	100%
Transfer Out Enquiry	56	5 days	100%
Total	3,555		

Other Measures

Area	Measure	Completed
Employer Liaison Meetings	1 per annum	1 meeting
Benefit Statements	by end of August	31 st August 2018

The fifth liaison meeting with all Admitted and Scheduled Bodies was held during 2018/19 and covering the changes that had been made to the annual reporting for the 2018/19 year end and affording the employers the chance to asks questions to the Pensions Team. Going forward we will continue to hold the liaison meeting towards the end of the financial year where we will discuss up-coming legislative changes and requirements for the year end processing.

Key Administration Tasks

Task	Total received
New entrants	637
Early leavers	536
Retirements	227
Deaths in service	12
Deaths in deferment	6
Deaths in retirement	91
New Widows(ers), Child Pensions	47
Estimates	1,036
Pension credit members	-