

Administration Activity

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Key Performance Indicators

The analysis below shows performance of the administration team in relation to key processes over the past 12 months. The bold line shows the KPI target. To pattern of cases over the year is shown on the right-hand side.

No. Cases completed by day count	0-5 days	6-10 days	11-15 days	16-20 days	21-30 days	Total	Jun 2022	Sept 2022	Dec 2022	Mar 2023
Active Retirement	218	106	134			458	114	125	115	104
Deferred Retirement	187	182	466			835	203	222	178	232
Estimates	147	376	1,561			2,084	563	594	437	490
Deferred Benefits	100	44	128	160	3,070	3,502	908	1,012	844	738
Transfers In & Out	40	38	32			110	19	16	29	46
Divorce	17	58	74			149	40	32	22	55
Refunds	94	310	142			546	120	150	151	125
Rejoiners	28	13	54	236		331	72	52	59	148
Interfunds	83	111	242			436	109	99	91	137
Death Benefits	335	54	84			473	77	123	107	166
Total	1,249	1,292	2,917	396	3,070	8,924	2,225	2,425	2,033	2,241

This casework does not include periodic tasks (such as the triennial valuation, publication of the Annual Benefit Statements, End of Year processes or notification of changes to Regulations).

Work in Progress

The Administration Performance does not reflect work in progress which is with the team, employers, members or other third parties. The analysis below shows casework in progress at 31 March 2023 in relation to key processes.

No. Case in Progress. Day count from receipt	0-5 days	6-10 days	11-15 days	16-20 days	21-30 days	31-40 days	Total	Previous Quarter
Active Retirement	13	4	1				18	10
Deferred Retirement	12	12	6		1		31	24
Estimates	45	102	14	6	5	8	180	221
Deferred Benefits	16	131	77	36	67		327	378
Transfers In & Out	10	3			1		14	12
Divorce	15	2	2		2	3	24	9
Refunds	14	18	7		1		40	6
Rejoiners	8	8	19	14	1		50	52
Interfunds	16	10	3	1			30	35
Death Benefits	2	8	3	4	9	14	40	39
Total	151	298	132	61	87	25	754	786
Previous Quarter	124	331	124	83	96	28	786	

Portal access

The table shows registrations to the Member Portal (which allows members to view their Annual Benefit Statement, produce retirement estimates and to access and update their personal details) and the number of log in to the Member Portal over the quarter.

As of 31 March 2023, there are 163 West Sussex employers signed up to the Employer Hub (which allows them to submit data on starters/leavers and run estimate). The employers who are not currently registered are those with a low number of employees/members and therefore the impact of them not being registered is minimal.

	Registrations 31 Mar 2023	No. Log In Mar 22	No. Log In Dec 22	No. Log In Sept 22
Active: Registered	12,478 (48%)	6,105	4758	9,825
Active: Opt out of online	165 (1%)	-		
Active: No Response	13,287 (51%)	-		
Deferred: Registered	12,379 (34%)	5,056	3269	5,299
Deferred: Opt out of online	212 (1%)	-		
Deferred: No Response	24,252 (66%)	-		
Pensioner: Registered	10,185 (42%)	4,062	2932	2715
Pensioner: Opt out of online	6,168 (26%)	-		
Pensioner: No Response	7,633 (32%)	-		
Total: Registered	35,042 (40%)	15,223	10,959	17,839
Total: Opt out of online	6,545 (8%)	-		
Total: No Response	45,172 (52%)	-		

Call and email volumes

The analysis below shows the call and email volumes received by the administration team over the past six months.

Month	Jul-22	Aug-22	Sep-22	Dec-22	Jan-22	Feb-22	Mar-22	Total
Calls received	521	506	490	314	615	536	Not available	2,982
Calls answered	516	498	481	310	590	524	Not available	2,919
Calls abandoned	5	8	9	4	25	12	Not available	63
Average wait time (seconds)	73	61	72	63	140	159	Not available	99 (avge)
Emails	599	494	788	336	489	522	Not available	3,228

Contribution Monitoring

The table below shows Scheme Employer performance in respect of their statutory responsibilities to paying their contributions to the Fund (by 22 of each month following deduction) and to provide a valid remittance advice.

Officers are working with employers who do not provide the required information in a timely manner, or whose contributions do not reconcile.

Figures for November 2022 have been updated to reflect a late payment from one employer which has not yet been received. This has been escalated.

	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb
Total Active Employers	211	211	213	214	214	213	217	215	216	216	216
Fully compliant	203	199	205	199	193	199	208	198	212	208	200
Not compliant – late remittance / payment	8	12	8	15	21	14	9	17	4	8	16
Total Value of Late Payments (£)	35,133	70,326	994	3,028	8,871	11,193	-	22,485	0	0	0
Number of Late payments still outstanding	-	-	-	-	-	-	-	1			
Total Amount Still overdue (£)	-	-	-	-	-	-	-	5,145			

Complaints and Compliments

Over the year to 31 March 2023 the team received 26 compliments.

Over the same period, nine complaints were responded to and additional information provided to the Pensions Ombudsman for one complaint, and to the Pensions Ombudsman Early Resolution team for two complaints.

Officers consider lessons learnt and any service improvements to be implemented following the receipt of a complaint.

Month	Formal/ Informal	Current Status	Summary of complaint	Learning points
April 2022	Formal	Closed	Information provided about ability to access pension under flexible retirement.	Further training provided
May 2022	Formal complaint	Closed	Ability to access member Portal	N/A
June 2022	Formal complaint	Closed	Time taken to complete an estimate.	Reminder to keep members updated on case work.
July 2022	Formal complaint	Closed	Delay to receiving trivial commutation payment	Reminder to contact members if request is not deliverable.
July 2022	Formal complaint	Closed	Information provided about bringing deferred pensions into payment where they have different payment dates	N/A as considered letter is clear
August 2022	Formal complaint	Closed	Missed request to provide CETV on divorce.	Reminder to check for multiple requests when reviewing incoming post. Reminder to keep members updated on case work.

Month	Formal/ Informal	Current Status	Summary of complaint	Learning points
August 2022	Formal complaint	Closed	Lack of explanation provided about how a refund amount had been calculated.	Reminder to keep members updated on case work.
November 2023	Pensions Ombudsman	Ongoing	Record not correctly reflecting cessation of additional pension contribution contracts.	<i>Ongoing</i>
December 2022	Formal complaint	Closed	Delay in processing transfer out request.	Review member communication on transfer out process
February 2023	Pensions Ombudsman Early Resolution Service	Closed	Calculated pension and lump sum significantly lower than estimates.	Reminder to provide full explanation of any data cleansing completed where it impacts on a member.
February 2023	Pensions Ombudsman Early Resolution Service	Ongoing	Calculated pension and lump sum significantly lower than estimates.	Reminder to provide full explanation of any data cleansing completed where it impacts on a member.
February 2023	Formal complaint	Closed	Calculated pension and lump sum significantly lower than Annual Benefit Statement.	Reminder to provide full explanation of any data cleansing completed where it impacts on a member.