

## Appendix A - Administration Activity

### Administration Activity

#### 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.

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). It also does not include work in progress, which is shown on the next page.

<b>No. Cases completed by day count</b>	<b>0-5 days</b>	<b>6-10 days</b>	<b>11-15 days</b>	<b>16-20 days</b>	<b>21-30 days</b>	<b>31-40 days</b>	<b>Total</b>	<b>Quarter to 30-Jun 23</b>	<b>Quarter to 31-Mar 23</b>	<b>Quarter to 31-Dec 23</b>	<b>Quarter to 30-Sep 23</b>
Active Retirement	271	99	95				<b>465</b>	121	104	115	125
Deferred Retirement	243	205	416				<b>864</b>	232	232	178	222
Estimates	163	469	1,363				<b>1,995</b>	474	490	437	594
Deferred Benefits	104	39	86	151	2,975		<b>3,355</b>	761	738	844	1,012
Transfers In & Out	36	54	25				<b>115</b>	24	46	29	16
Divorce	30	70	57				<b>157</b>	48	55	22	32
Refunds	80	251	247				<b>578</b>	152	125	151	150
Rejoiners	37	26	77	213			<b>353</b>	94	148	59	52
Interfunds	131	108	192				<b>431</b>	104	137	91	99
Death Benefits	375	71	84				<b>530</b>	134	166	107	123
<b>Grand Total</b>	<b>1,470</b>	<b>1,392</b>	<b>2,642</b>	<b>364</b>	<b>2,975</b>	<b>-</b>	<b>8,843</b>	2,144	2,241	2,033	2,425

## 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 on 30 June 2023 in relation to key processes and compares to the previous quarter.

<b>No. Case in Progress. Day count from receipt</b>	<b>0-5 days</b>	<b>6-10 days</b>	<b>11-15 days</b>	<b>16-20 days</b>	<b>21-30 days</b>	<b>31-40 days</b>	<b>Total 30 Jun 2023</b>	<b>Total 31 Mar 2023</b>
Active Retirement	12	6		1			<b>19</b>	18
Deferred Retirement	13	17	5		2	2	<b>39</b>	31
Estimates	139	140	15	4	7	7	<b>312</b>	180
Deferred Benefits	130	141	30	78	10		<b>389</b>	327
Transfers In & Out			1				<b>1</b>	14
Divorce	17	12	1			2	<b>32</b>	24
Refunds	7	10	-				<b>17</b>	40
Rejoiners	27	24	14	6	1		<b>72</b>	50
Interfunds	12	10	3	1	3		<b>29</b>	30
Death Benefits	6	2	6	5	3	12	<b>34</b>	40
<b>Total</b>	<b>363</b>	<b>362</b>	<b>75</b>	<b>95</b>	<b>26</b>	<b>23</b>	<b>944</b>	<b>754</b>
Total 31 Mar 2023	151	298	132	61	87	25	754	

## 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). Also included are the number of log ins to the Portal.

	<b>Membership split 31 Mar 2023</b>	<b>Membership split 30 Jun 2023</b>	<b>No. Log in 1 Jan to 31 Mar 2023</b>	<b>No. Log in 1 Apr to 30 Jun 2023</b>
Active: Registered	12,478 48%	<b>12,633</b> <b>49%</b>	6,105	<b>4,022</b>
Active: Opt out of online	165 1%	<b>161</b> <b>1%</b>		
Active: No Response	13,287 51%	<b>13,076</b> <b>51%</b>		
Deferred: Registered	12,379 34%	<b>12,914</b> <b>35%</b>	5,056	<b>3,374</b>
Deferred: Opt out of online	212 1%	<b>220</b> <b>1%</b>		
Deferred: No Response	24,252 66%	<b>24,019</b> <b>65%</b>		
Pensioner: Registered	10,185 43%	<b>10,718</b> <b>44%</b>	4,062	<b>6,942</b>
Pensioner: Opt out of online	6,168 26%	<b>6,179</b> <b>26%</b>		
Pensioner: No Response	7,633 32%	<b>7,320</b> <b>30%</b>		
<b>Total: Registered</b>	<b>35,042</b> <b>40%</b>	<b>36,265</b> <b>42%</b>	<b>15,223</b>	<b>14,338</b>
<b>Total: Opt out of online</b>	<b>6,545</b> <b>8%</b>	<b>6,560</b> <b>8%</b>		
<b>Total: No Response</b>	<b>45,172</b> <b>52%</b>	<b>44,415</b> <b>51%</b>		

## Call and email volumes

*To follow*

## Contribution Monitoring

*All LGPS contributions are expected to be received by the Fund on the 22nd of each month following deduction. The analysis below shows performance of employers for the year to date and reflects the payroll month.*

<b>Month</b>	<b>Apr-23</b>	<b>May-23</b>
Total Active Employers	218	219
Payment received & validated by statutory deadline	196	192
Total Value of Late Payments (£)	679	1,208
Number of Late Remittances	22	27
Total Amount still overdue (£)	-	-
Number of Late Remittances still outstanding	0	0

## Complaints and Compliments

Over the quarter the team received nine compliments and one complaint.