

**ITEM No ...5.....**

**REPORT TO: PENSION SUB-COMMITTEE OF THE POLICY & RESOURCES  
COMMITTEE & PENSION BOARD – 5<sup>TH</sup> MARCH 2018**

**REPORT ON: PENSION ADMINISTRATION STRATEGY UPDATE**

**REPORT BY: EXECUTIVE DIRECTOR OF CORPORATE SERVICES**

**REPORT NO: 81-2018**

**1. PURPOSE OF REPORT**

This report provides an update as to how the fund have been able to meet the strategic performance measures against which the Fund and participating employers are assessed with performance being reported to the Committee.

**2. RECOMMENDATIONS**

The Pension Sub-Committee are asked to note the content of the report.

**3. FINANCIAL IMPLICATIONS**

There are no financial implications.

**4. BACKGROUND**

The Pension Sub-Committee approved the current Pensions Administration Strategy (Article III of the Minute of Meeting of the Pension Sub-Committee of the Policy and Resources Committee, Report No 318-2015 refers), effective following full implementation of the Pensionsweb self-service system, which had recently commenced at time of report, with full on-boarding anticipated by 31<sup>st</sup> March 2016.

The project encountered a number of obstacles, including sale of system to alternative suppliers, which resulted in required migration mid project. The project is now nearing completion and this will enable baseline comparison when implementation is complete.

**5. FINDINGS**

Appendix 1 provides information of planned performance measurement and information on current data.

**6. POLICY IMPLICATIONS**

This report has been screened for any policy implications in respect of Sustainability, Strategic Environmental Assessment, Anti-Poverty, Equality Impact Assessment and Risk Management.

There are no major issues, other than Risk Management itself, which is addressed through the register.

**7. CONSULTATIONS**

The Chief Executive and Head of Democratic and Legal Services have been consulted in the preparation of this report.

**8. BACKGROUND PAPERS**

None

**GREGORY COLGAN**  
**EXECUTIVE DIRECTOR OF CORPORATE SERVICES**

**19 FEBRUARY 2018**

**APPENDIX 1 – Performance Measures**

Baseline information is not yet available for the following measures until full system implementation on 1<sup>st</sup> April 2018. From that point, full measurement and monitoring of the following will commence and will be reported on a quarterly basis.

<b>Employer Performance Measures</b>	
New starts notification	within 20 working days
Changes notified	within 20 working days
Retirement information received	at least 20 working days before
Early leaver notification	within 20 working days
Death in service notification – within 10 working days	within 10 working days
Query responses	within 10 working days
Year-end queries	within 10 working days
<b>Pension Administration Performance Measures</b>	
Estimates Supplied	within 15 working days
Query Responses	within 20 working days
Complaints	within 10 working days
Customers	seen within 10 working days
<b>Key Process / Task Measurement</b>	
New entrants	20 working days
Early leavers	20 working days
Retirements	20 working days
Death in service	10 working days
Transfers	20 working days
Estimates	15 working days

Other measures that have been measured and monitored over the 12 months to 31<sup>st</sup> December 2017 are as follows:

Employer Contribution payments (due 19th of month)

Month	% received in target	Month	% received in target
April	100%	October	100%
May	100%	November	100%
June	100%	December	100%
July	100%	January	100%
August	100%	February	100%
September	100%	March	100%

<b>Employer Communications</b>	<b>Number</b>	<b>Previous year</b>
Employer Events	7	6
Employer Training Events	2	2
Employer Briefings	2	2
Employer Bulletins	1	1

