

Agenda Item No 5(c)

**DERBYSHIRE COUNTY COUNCIL
PENSIONS AND INVESTMENT COMMITTEE**

26 October 2016

Report of the Director of Finance

ADMISSION BODIES

**THE DEVELOPMENT OF A PERFORMANCE MANAGEMENT REGIME IN
THE ADMINISTRATION OF THE DERBYSHIRE PENSION FUND**

1 Purpose of the Report

To update the Pensions and Investments Committee on progress towards the development of a performance management regime to support the administration of the Derbyshire Pension Fund

2 Information and Analysis

As the Committee is aware the Civica UPM Pensions Administration System was introduced in December 2014 to replace the previous Heywood administration system. An area of the system's functionality that has required development by the Pensions Team is its ability to produce accurate management information. The priority information items for the team have been operational reports, identifying key events for Fund members. These include for example, identifying Fund members whose deferred benefits are about to become payable, or whose children's benefits are due to be reviewed.

Having established this level of reporting, attention has turned to producing performance management information. There are two aspects to this. Firstly, identifying how many of each particular type of case is completed each month, which helps with work allocation and understanding work patterns. Secondly, identifying how successful the team is in achieving its targets for completion, which helps to identify, and subsequently measure, improvement areas.

The reports development work continues, and the information that the team is able to produce is becoming more sophisticated. At this point, the data in the system can be pulled together to give totals of the major work area items completed each month. The totals for the first six months of 2016/17 are below.

REPORT	Apr-16	May-16	Jun-16	Jul-16	Aug-16	Sep-16
Actives (New Starters)	215	128	173	251	291	507
Early Leavers	65	79	66	88	68	41
Deferred	106	128	136	207	231	112
Retirements	107	105	131	111	98	150
Deaths	75	73	84	47	91	55
Quotes	95	89	139	158	119	109
Aggregation	74	134	93	119	200	123
Total	737	736	822	981	1098	1097

The total number of work items being completed each month has increased over the course of the last six months from 737 in April to 1097 in September. These figures enable the Pensions Management Team to quantify the positive impact of recent process and structural changes, and send a positive message to staff about the impact of their efforts. The figures will also help with the accuracy of resource planning going forward.

Progress has also been made towards identifying how promptly work is being completed in relation to nationally agreed targets. It is intended to provide these figures at the next meeting of the Committee. It also the intention to provide both sets of figures to the Committee every 6 months

3 Financial Considerations

None

4 Other Considerations

In preparing this report the relevance of the following factors has been considered: legal and human rights, human resources, equality and diversity, health, environmental, transport, property, social value and prevention of crime and disorder.

5 Officer Recommendation

That the Committee notes the progress being made on developing performance information

PETER HANDFORD

Director of Finance

14th October 2016