

DERBYSHIRE COUNTY COUNCIL
PENSIONS and INVESTMENTS COMMITTEE

27 April 2016

Report of the Director of Finance
Administration Performance Monitoring

1. Purpose of the Report

To inform the Pensions and Investments Committee of the performance monitoring regime being introduced to support Pension Fund administration

2. Information and Analysis

Since the introduction of the Civica UPM System, all efforts have been focused on developing the system to carry out automated processes and calculate benefits accurately and efficiently. The reports that have been produced so far have been those that are statutorily required by HMRC, the Government Actuaries Department (GAD) and the Office of National Statistics (ONS).

For 2016/17 however, the team has developed reports that measure internal operational performance. These reports will run regularly to;

- i. enable understanding of how well the team is meeting its targets and, therefore, serving customers,
- ii. help to identify improvement areas,
- iii. enable Derbyshire Pension Fund to compare its effectiveness with other LG Pension Funds and,
- iv. provide accurate information for national benchmarking exercises, including the new data gathering and comparison exercise managed by the Scheme Advisory Board.

The reports suite comprises;

- a) Movement analysis; a quarterly report on the numbers of active contributors, deferred members and pensioners in the Fund
- b) Status changes; a quarterly report on the numbers of starters, early leavers, retirements and deaths processed in the quarter
- c) Data cleanliness; this will help to identify employing authorities that are struggling to provide prompt and accurate data in order to help them and also to help demonstrate to the Pensions

Regulator that Derbyshire Pension Fund is supporting employers to meet their LGPS responsibilities

- d) Internal performance against targets; a monthly report showing, for example, how many retirement lump sums were paid within 5 days of receiving the employer's notification and how many Membership Certificates were produced within 1 month of a new member joining the Fund.
- e) Individual workload; this will be used when there are concerns about an individual's performance, to show the numbers of cases they are completing accurately; it should help to identify areas of training and support need where staff members are struggling with the complexity of their workload.

It is intended that a performance data from categories a) to d) will be presented to Pensions and Investments Committee every six months.

3. Financial Considerations

There is no cost to the Pension Fund budget.

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 and prevention of crime and disorder.

6. OFFICER'S RECOMMENDATION

That Members note the Report.

PETER HANDFORD
Director of Finance

County Hall
Matlock

16 April 2016