

Surrey Pension Team - Performance Report
April - June 2022

| Case Type | Performance standard | Tolerable performance | PRELIMINARY LAYOUT | | | | | | |
|--|----------------------|-----------------------|-----------------------------|---------------------------|-------------------------|----------------------|------------------------------------|----------------------|----------------------|
| | | | A % completed within SLA | B Case opening balance | C New cases received | D Cases completed | E Terminated Cases (Calculated) | F Closing balance | G Future Workload |
| DEATH NOTIFICATION (tPR) | 5 working days | 90% | 98% | - | 160 | 138 | 4 | 18 | 8 days |
| SURVIVOR'S PENSIONS (tPR) | 10 working days | 90% | 91% | 4 | 121 | 88 | 26 | 11 | 8 days |
| DEATH BENEFITS PAYABLE (tPR) | 10 working days | 90% | 92% | 10 | 66 | 57 | 5 | 14 | 15 days |
| BALANCE OF PAYMENTS (tPR) | 10 working days | 90% | 94% | 11 | 217 | 195 | 9 | 24 | 8 days |
| RETIREMENT (COMPLETE) (tPR) | 15 working days | 85% | 90% | 231 | 500 | 398 | 39 | 294 | 44 days |
| ILL HEALTH RETIREMENT (COMPLETE) (tPR) | 15 working days | 90% | 100% | 3 | 8 | 9 | 1 | 1 | 7 days |
| REFUNDS (tPR) | 20 working days | 80% | 95% | 122 | 867 | 732 | 117 | 140 | 12 days |
| RETIREMENT (INITIAL NOTIFICATION) | 15 working days | 80% | 94% | 127 | 833 | 594 | 119 | 247 | 25 days |
| ILL HEALTH RETIREMENT (INITIAL) | 15 working days | 90% | 100% | - | 14 | 8 | (1) | 7 | 53 days |
| DEFERRED STATUS | 2 months | 80% | 89% | 3,882 | 1,195 | 1,165 | 366 | 3,546 | 9 months |
| EMPLOYER ESTIMATE | 10 working days | 80% | 89% | 5 | 98 | 55 | 7 | 41 | 45 days |
| LGPS TRANSFER IN (ESTIMATE) | 20 working days | 80% | 83% | 647 | 509 | 563 | 70 | 523 | 56 days |
| NON-LGPS TRANSFER IN (ESTIMATE) | 20 working days | 80% | 71% | 178 | 32 | 37 | 1 | 172 | 280 days |
| LGPS TRANSFER OUT (ESTIMATE) | 20 working days | 80% | 87% | 97 | 174 | 156 | 33 | 82 | 32 days |
| NON-LGPS TRANSFER OUT (ESTIMATE) | 20 working days | 80% | 91% | 88 | 82 | 65 | 17 | 88 | 82 days |
| LGPS TRANSFER IN (ACTUAL) | 20 working days | 80% | 75% | 444 | 492 | 479 | 45 | 412 | 52 days |
| NON-LGPS TRANSFER IN (ACTUAL) | 20 working days | 80% | 87% | 36 | 36 | 32 | 3 | 37 | 70 days |
| LGPS TRANSFER OUT (ACTUAL) | 20 working days | 80% | 88% | 51 | 125 | 122 | 1 | 53 | 26 days |
| NON-LGPS TRANSFER OUT (ACTUAL) | 20 working days | 80% | 86% | 12 | 21 | 15 | - | 18 | 72 days |
| NEW STARTER | 30 working days | 80% | | | | 1828 | | | |
| TOTAL OPEN CASES | | | 89% | 5,948 | 5,550 | 6,736 | 862 | 5,728 | |

Summary

In line with the Surrey Pension Team "transformation program" staff moved into the new team structure from 1 May.

For cases received during this reporting period, performance was met in all but one work area (transfers in).

Transfers are the responsibility of the Future Benefits Team. This is a new team with new team members. As such some training needs have been identified and this is being addressed.

In period overall performance averages were: SLA achieved over all work areas 89% and 94% for tPR cases.

Surrey Pension Team - Performance Report
July - September 2022

| Case Type | Performance standard | Tolerable performance | PRELIMINARY LAYOUT | | | | | | |
|--|----------------------|-----------------------|-----------------------------|---------------------------|-------------------------|----------------------|------------------------------------|----------------------|----------------------|
| | | | A % completed within SLA | B Case opening balance | C New cases received | D Cases completed | E Terminated Cases (Calculated) | F Closing balance | G Future Workload |
| DEATH NOTIFICATION (tPR) | 5 working days | 90% | 82% | 18 | 207 | 202 | 3 | 20 | 6 days |
| SURVIVOR'S PENSIONS (tPR) | 10 working days | 90% | 90% | 11 | 82 | 64 | 10 | 19 | 18 days |
| DEATH BENEFITS PAYABLE (tPR) | 10 working days | 90% | 86% | 14 | 103 | 71 | 27 | 19 | 16 days |
| BALANCE OF PAYMENTS (tPR) | 10 working days | 90% | 93% | 24 | 197 | 190 | 2 | 29 | 9 days |
| RETIREMENT (COMPLETE) (tPR) | 15 working days | 85% | 76% | 294 | 487 | 462 | 41 | 278 | 36 days |
| ILL HEALTH RETIREMENT (COMPLETE) (tPR) | 15 working days | 90% | 70% | 1 | 11 | 9 | 1 | 2 | 13 days |
| REFUNDS (tPR) | 20 working days | 80% | 97% | 140 | 1,327 | 885 | 126 | 456 | 31 days |
| RETIREMENT (INITIAL NOTIFICATION) | 15 working days | 80% | 87% | 247 | 679 | 622 | 93 | 211 | 20 days |
| ILL HEALTH RETIREMENT (INITIAL) | 15 working days | 90% | 86% | 7 | 28 | 17 | 7 | 11 | 39 days |
| DEFERRED STATUS | 2 months | 80% | 89% | 3,546 | 1,510 | 1,036 | 200 | 3,820 | 11 months |
| EMPLOYER ESTIMATE | 10 working days | 80% | 78% | 41 | 45 | 63 | 10 | 13 | 12 days |
| LGPS TRANSFER IN (ESTIMATE) | 20 working days | 80% | 92% | 523 | 664 | 496 | 120 | 571 | 70 days |
| NON-LGPS TRANSFER IN (ESTIMATE) | 20 working days | 80% | 73% | 172 | 52 | 41 | 23 | 160 | 234 days |
| LGPS TRANSFER OUT (ESTIMATE) | 20 working days | 80% | 94% | 82 | 221 | 191 | 50 | 62 | 20 days |
| NON-LGPS TRANSFER OUT (ESTIMATE) | 20 working days | 80% | 86% | 88 | 78 | 64 | 20 | 82 | 77 days |
| LGPS TRANSFER IN (ACTUAL) | 20 working days | 80% | 80% | 412 | 793 | 621 | 90 | 494 | 48 days |
| NON-LGPS TRANSFER IN (ACTUAL) | 20 working days | 80% | 84% | 37 | 50 | 39 | 5 | 43 | 66 days |
| LGPS TRANSFER OUT (ACTUAL) | 20 working days | 80% | 90% | 53 | 136 | 116 | 9 | 64 | 33 days |
| NON-LGPS TRANSFER OUT (ACTUAL) | 20 working days | 80% | 93% | 18 | 23 | 13 | 9 | 19 | 88 days |
| NEW STARTER | 30 working days | 80% | | | | 1514 | | | |
| TOTAL OPEN CASES | | | 86% | 5,728 | 6,693 | 6,716 | 846 | 6,373 | |

Summary

Q2 performance dipped overall with SLA averages of 86% for all work areas and 85% for tPR cases.

Performance dipped due to a combination of reasons: staff resources as a result of resignations and annual leave commitments.

Immediate Benefits Team operated without two experienced Benefit Officers which meant performance for tPR cases was below SLA in 4 KPIs.

Transfer in cases increased within period following commencing work in the banking area of identifying and allocating payments received.

The work to provide the Annual Allowance statements was completed in the Service Delivery team this year for the first time so this took some resource away from normal BAU.

Performance Table Key

| | | |
|---|----------|---|
| % Completed within SLA | A | Percentage of cases completed in period within SLA. |
| Case Opening Balance | B | Total cases open at the start of the period (this may vary from the previous month closing balance due to terminated cases). |
| New cases received | C | Total cases received in reporting period (including terminated). Not all cases are due for completion within period. |
| Cases completed | D | The total cases completed during period (excluding terminated cases) |
| Terminated Cases | E | Cases terminated in period due to duplication or set up incorrectly |
| Closing Balance | F | Cases remaining from period less terminated cases ($F = B + C - D - E$) |
| Future Workload | G | Total number of estimated days to process closing balance cases ($F/D * 60$ working days) |
| Assumed tolerance of performance SLA | | Green = tolerable performance measure met Amber = within 10% of tolerable performance measure Red = more than 10% of tolerable performance measure |
| Future workload tolerance | | Green = less than 1 times the performance standard Amber = within 1 - 2 times more than the performance standard Red = more than 2 times the performance standard |

This page is intentionally left blank