

Surrey Pension Team - Performance Report  
April - June 2022

PRELIMINARY LAYOUT

Case Type	Performance standard	Tolerable performance	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			
<b>TOTAL OPEN CASES</b>			<b>89%</b>	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**

PRELIMINARY LAYOUT

Case Type	Performance standard	Tolerable performance	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			
<b>TOTAL OPEN CASES</b>			<b>86%</b>	<b>5,728</b>	<b>6,693</b>	<b>6,716</b>	<b>846</b>	<b>6,373</b>	

**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

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

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