

Date:	9th May 2017
Classification:	General Release
Title:	Monitoring of Data to Surrey County Council
Report of:	Lee Witham, Director of People Services
Wards Involved:	All
Policy Context:	Service Delivery
Financial Summary:	Limited

1. Executive Summary

- 1.1 The purpose of this paper is to provide the Board with an update on the Key Performance Indicators (KPIs) showing Surrey County Council's (SCC's) performance for the period February to March 2017. The detailed KPIs are shown in appendix 1.

2. Current Position

- 2.1 As reported in the papers for 6th March Pension Board, SCC had been asked to provide the KPIs on a quarterly basis. This was to allow time for SCC to prepare and collate the data and in turn WCC could present at the appropriate quarterly meetings, both Committee and Board.
- 2.2 Following the last Board and Committee meetings and the concerns shown there, we have agreed with SCC to move to monthly KPIs so we can ensure that People Services are aware of any concerns or issues in a timelier manner and can intervene as appropriate.
- 2.3 As mentioned in previous papers, WCC see this as a living document and it will be constantly reviewed to ensure that it provides the data required by WCC, Pension Board and Pension Committee to hold SCC to account in delivering an improved service.

- 2.4 In the Board papers of 6th March we highlighted that we have drawn SCC's attention to the following key areas where we expect to see an improvement:
- 2.4.1 Where members are waiting for the payment of their pension benefit.
 - 2.4.2 Retirement options issued to members.
 - 2.4.3 Deferred benefits and payment of lump sum.
 - 2.4.4 Transfers out of non-LGPS schemes.
 - 2.4.5 Pension/redundancy estimates.
 - 2.4.6 Responding to members' correspondence.
- 2.5 The attached KPIs show improvements in most of the areas outlined in 2.4 above although there is still scope for more improvement and we will continue to push SCC for this. In particular we believe 'Notifications to members due a deferred benefit' (line 14 in appendix) could be improved. This is where an ex-employee is about to reach an age when their payments are due to be made. The agreed KPI is that notification is received 3 months before the date and although it has improved from just 2 weeks notice from the last reported KPI's to 2 months notice before the due date, it is still below expected levels.
- 2.6 It is recognised that due to BT's continuing inability to supply the required data, in particular with regards leavers, that SCC should not be held to account over these issues if it is clearly a BT error. WCC continue to work with BT to ensure that this information is forthcoming in the near future. In the meantime the retained pension team within People Services are working with SCC to provide this data.
- 2.7 As previously reported SCC have acknowledged the need for a tighter control of case management in order to improve the KPIs. They have reorganised the pension administration team with two new team managers overseeing the running of our service.

3. Summary

- 3.1 The KPIs for February and March already reflect an improvement in the service provided by SCC. This is due in large part to the reorganisation SCC has implemented.
- 3.2 People Services have also appointed additional resources to assist with some of the administration requirements that BT are currently failing to provide and this should help to ensure a continued improvement in the KPIs.