

Subject	Quarterly Administration Update - Q3 2022-23	Status	For Publication
Report to	Local Pension Board	Date	2 nd February 2023
Report of	Director		
Equality Impact Assessment	Not Required	Attached	No
Contact Officer	George Graham – Director Lindsay Grayson – Service Manager – Benefits John Ronson – Service Manager – Support and Engagement Joanne Webster – Service Manager – Customer Services	Phone	01226 666439 01226 666399 01226 666380 01226 666510
E Mail	ggraham@sypa.org.uk lgrayson@sypa.org.uk jronson@sypa.org.uk jwebster@sypa.org.uk		

1 Purpose of the Report

- 1.1 To update Members on administration performance and issues for the period from 1st October 2022 to 31st December 2022
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2 Recommendations

- 2.1 Members are recommended to:
- a. **Comment on the content of the revised administration update and indicate any areas where they would like to receive further detail**
 - b. **Highlight any areas of administration where further assurance may be required**
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3 Link to Corporate Objectives

- 3.1 This report links to the delivery of the following corporate objectives:

Customer Focus

To design our services around the needs of our customers (whether scheme members or employers). The report includes reference to feedback from our customers.

Listening to our stakeholders

To ensure that stakeholders' views are heard within our decision-making processes. The report includes information about the engagement with the employers in the scheme and how SYPA can support them to complete their responsibilities.

Effective and Transparent Governance

To uphold effective governance showing prudence and propriety at all times. The report includes detail on the overall administration performance to ensure Members are able to scrutinise the service being provided to our customers.

4 Implications for the Corporate Risk Register

- 4.1 The actions outlined in this report do not have implications for the Corporate Risk Register.

5 Background and Options

- 5.1 This report seeks to make Board Members aware of the main areas of administration performance and any topical issues relevant to the reporting period(s) in question for the most recently completed quarter. On this occasion due to unplanned staff absence the report while covering the key areas of performance is not as comprehensive as is usual, and a number of service managers will be present at the meeting to ensure that questions from the Board can be properly answered. A review of the format and presentation of all performance reporting across the organisation is about to commence and future reports will evolve to reflect the changes brought about by this review.

Staffing

- 5.2 The following table is a summary of joiners and leavers for the administration service over the last three months. The Authority has been successful in recruiting to some existing vacancies, although it has not been possible to fill vacancies in the Pensions Systems Team.

Starters	Comments
1 x Benefits Team Manager	Vacancy filled
1 x Customer Services Officer	Vacancy filled
Leavers	
None	
Vacancies in Administration	
1 x Senior Systems Officer	No suitable candidates not filled
1 x Systems Officer	Entry level
2x Team Leaders- Benefits	New roles internal recruitment by 31.3.23
1x Team Leader – Systems Development	New roles internal recruitment by 31.3.23
1x Senior Practitioner – Benefits	New role internal recruitment by 31.3.23
1x Senior Practitioner – Customer Services	New role internal recruitment by 31.3.23

- 5.3 The above table includes a number of new roles created as a result of the recently approved resources and resilience review which will be filled through internal recruitment during the current quarter. This will result in an inevitable cascade effect where lower-level roles then need to be filled through external recruitment. This is likely to be a more significant feature than normal for the next two or three quarters as we work through the process of filling these new roles.
- 5.4 It is apparent that external recruitment to roles in the Pensions Systems Team is challenging and subsequent to the quarter end internal recruitment has resulted in an additional vacancy at Senior Systems Officer level. Before going back out to recruit to these roles we will re-examine the role profile and consider the balance of roles at different levels within the Team given the addition of the new Team Leader role. This is a fairly specialist area where we are competing for skills that are in short supply in addition to the generally tight labour market conditions and we may need to consider more creative approaches to filling these roles if we are unsuccessful in the next round of recruitment. Given the level of vacancies within this team a small number of key priorities has been agreed for the period up to the end of the financial year in order to maximise the benefit from the resources that are available.

Sickness Absence

- 5.5 In terms of sickness absence, the table below shows the annualised absence levels for the administration service for the last two years and the current year based on the year-to-date position together with the absolute levels of absence in days per FTE for the last two quarters. This is a slightly simplified presentation which should make it easier to discern trends.

Average Days per FTE (Admin Service only)	2020-21	2021-22	2022-23 YTD Annualised	2022-23 Q3	2022-23 Q2
Short-Term	1.50	3.27	3.60	0.99	1.25
Long-Term	3.00	5.48	4.88	0.31	1.98
Total	4.50	8.75	8.48	1.30	3.23

- 5.6 While there has been some improvement in the overall position and one of the long-term sickness cases has now completed a return to work a further case has commenced, although as predicted the overall level of long-term absence has reduced. Short-term absence while lower than the previous quarter is predicted to be higher than last year which presumably reflects the impact of the increased incidence of “winter cold” type bugs over latter part of the quarter and running into this quarter. All of these issues are managed through the Authority’s managing attendance policy and where individuals hit a trigger level of absence over a rolling 12-month period then a formal process is instigated. There is a degree to which 2020-21 reflects an abnormally low level of absence due to lockdowns etc and we do appear to be returning to more normal levels of absence, however, the level is higher than is desirable and we will be continuing our overall efforts in terms of staff health and wellbeing alongside the formal policy to seek to address this.

Case Work Performance

- 5.7 The data below summarises the performance of the administration service over the quarter measured against the performance standards agreed by the Authority. The table below shows the casework volumes for the last two quarters, compared with the previous quarter but also compared with the corresponding quarter for the previous year for comparison.

Category	Volumes			Variance to Comparators	
	Q3 Previous Year	Q2 2022-23	Q3 2022-23	To Q3 Previous Year	To Q2 2022-23
Priority	1,620	1,605	1,430	-190	175
Non-Priority	13,139	13,815	17,124	3,985	3,309
Overall	14,759	15,420	18,554	3,795	3,134

- 5.8 Overall completed case volumes increased slightly by 202 cases. Incoming work volumes have also increased significantly mainly due to an additional 2,616 Joiner Checks being received this quarter reflecting a seasonal impact from changes in school staffing in September which is received by SYPA in October.
- 5.9 The following tables highlight the levels of performance for both priority and non-priority casework in terms of our service standards.

Priority Performance					
Q2 2021-22	Q3 2021-22	Q1 2021-22	Q1 2022-23	Q2 2022-23	Q3 2022-23
76%	86%	88%	82%	82%	71%

Non-Priority Case Performance					
Q2 2021-22	Q3 2021-22	Q4 2021-22	Q1 2022-23	Q2 2022-23	Q3 2022-23
72%	74%	73%	71%	65%	71%

- 5.10 Priority performance has reduced by 11% which is a material decline in performance over the quarter. Further investigation of the causes for this found that the main reason was waiting for further information to enable retirement cases to be processed. This meant staff were having to chase members for information which prolonged the end-to-end process. Non-Priority performance has seen a slight improvement.
- 5.11 The table below provides a summary of performance against the main transaction types. The reduction in performance for Death Payments requires further investigation as there is no obvious reason for this reduction in service levels other than completion of some older and perhaps more complex cases. This will be a focus for the team in Q4. Retirements also saw a significant drop in the level of service however long overall end-to-end times contributed to this and was mainly due to waiting for information. The Service Manager - Benefits has sample checked 100 of these cases and found that on each occasion when action was required on the case action was taken within 1-5 days. Service is recovering for General Enquiries as we see a reduction in volumes.

Case Type	Target Days	Q1 22-23 Volume	Q1 22-23 % on time	Q2 22-23 Volume	Q2 22-23 % on time	Q3 22-23 Volume	Q3 22-23 % on time	Comment
Priority								
Retirements	5	850	71%	884	73%	719	52%	See 5.11 & 5.12-5.13
Deaths - Acknowledge	5	286	90%	294	83%	154	85%	
Deaths - Payment	5	423	99%	468	98%	449	75%	See 5.11
Non Priority								
New Joiners	10	2132	99%	1989	91%	4284	89%	
Deferreds	20	1014	72%	957	56%	1204	57%	
Refunds	9	195	95%	132	89%	169	89%	
Transfers In	7	398	48%	283	47%	335	41%	
Transfers Out	5	299	66%	319	66%	351	72%	
Divorce	10	90	80%	104	80%	89	97%	
General enquiries	5	1113	56%	1322	44%	1144	63%	See 5.11
Estimates	5	1469	78%	1090	76%	1484	60%	
Aggregations	20	1025	62%	871	36%	1182	79%	See 5.17 & 5.18

5.12 Quarter 3 is the third quarter where the functionality for deferred members to retire online was available via the member portal. The introduction of this new functionality allows us to provide a further breakdown of the performance in relation to different retirement types and this is shown in the table below.

Retirement Case Type	Target Days	Number of cases Completed	Percentage Completed Within Target
Settlements			
Active Members (inc. Flex)	5	324	35%
Deferred Members (Online)	5	144	53%
Deferred Members (Offline and inc. Special Conditions*)	5	251	67%
Total		719	52%

* Special conditions in this context are members with a separate AVC fund (where retiring online is not possible) or those expressing an interest in trivial commutation.

5.13 The table above illustrates the service improvements available for deferred members if they use the online functionality and we will be continuing to promote this route for deferred members. The table also demonstrates that performance in processing active member retirements clearly needs to be an area of focus. The table below is a further breakdown of the total time taken to complete these cases. These are pure extracts from the administration system and a more detailed investigation into the cases recorded as taking greater than 11 days above the target time of 5 days is currently being undertaken. A verbal update will be provided to the Board on the progress with these investigations in anticipation that further reporting might be helpful in future.

Retirement Case Type	Total Cases	Completed In Time	Completed 0-5 days over	Completed 6-10 days over	Completed 11+ Days over
Settlements					
Active Members (inc. Flex)	324	112	41	23	148

5.14 At the last meeting, members of the Board were provided with a summary of cases outstanding at the end of Quarter Two of 2022/23. The tables below update these to 31 December 2022. The first part of the table shows a summary of cases in pending whilst we await information from third parties and the second table shows cases ready to be processed.

Case Type	Volumes of cases pending (awaiting external parties) End Q4 Prev Year	Volumes of cases pending (awaiting external parties) End Q1 2022-23	Volumes of cases pending (awaiting external parties) End Q2 current year	Variance to prior reporting period	
Priority					
All cases	493	459	420	481	61
Non Priority					
All cases	10,580	10,912	10,818	10942	124
Case Type	Volumes of cases to be processed/in processing End Q1 2022-23	Volumes of cases to be processed/in processing End Q2 2022-23	Volumes of cases to be processed/in processing End Q3 2022-23	Variance to prior reporting period	Number of active cases currently outside KPI measures
Priority					
Retirements	42	75	87	12	
Deaths	91	96	66	30	
Non Priority					
New Joiners	78	59	53	6	
Deferreds	809	1575	1532	43	Linked to unprocessed leavers
Refunds	13	13	25	12	
Transfers In	161	193	217	24	
Transfers Out	78	71	21	50	
Divorce	12	5	2	3	
General enquiries	120	90	199	109	
Estimates	408	456	442	14	
Aggregations	3,856	4,960	4938	22	
Unprocessed Leavers	1,159	1,534	2026	492	

5.15 At a previous meeting, Members requested some insight into the expected volumes of case work to be processed as part of 'business as usual'. We have attempted to demonstrate this by adding an additional column into the table above to show the numbers of cases that are outside of our KPI target measures for the two areas which remain of particular concern remain as highlighted in red in the table above.

- 5.16 We have explained to members previously that we are undertaking a project to introduce a means of processing the leavers either using automated tools or via bulk processing (or more likely a combination of both). The first stage of this project was to process these leavers on a bulk basis in a 'cloned' system environment ready to be submitted as part of the valuation extract. The next stage is to introduce additional validation checks to ensure the bulk process can be utilised in the live systems environment. This project has been delayed due to competing priorities within the Systems Teams and the overall availability of Systems Team resources as highlighted elsewhere in this report. Given the need to ensure that these cases are processed consideration is being given to alternative means of clearing this backlog if it is not going to be possible to introduce the automated solution before the end of March. Clearly the automated solution is the best solution and one we will continue to work on but the current number of unprocessed cases of this sort cannot be allowed to continue to build up.
- 5.17 In relation to aggregations, it is important to understand that the process is in two parts:
- The quotation stage where the member is provided with details of the impact of combining their various sets of benefits.
 - The settlement stage which occurs automatically 12 months after the quotation unless the member has expressed a preference prior to this.
- 5.18 While the overall numbers of outstanding cases remains excessive the team have reduced Aggregation Quotes by 1,001 cases however the analysis above also reflects the fact that a number of aggregation quotes completed 12 months ago have recently become active settlements counteracting the progress with quotations. Future reporting will be revised to separate the two stages of the process to allow a clearer understanding of progress to address this issue. Aggregations remain a focus for the Team and there is a plan to complete all quotes by the end of February 2023, which will allow the team to then focus on the settlements.

Statutory Disclosure Reporting

- 5.19 Due to unexpected staff absence it has not been possible to produce this information in time for the agenda deadline for this meeting. If the information is available prior to the meeting it will be circulated as a later addendum.

Employer Performance

- 5.20 Members will be aware that employers now submit individual data on a monthly basis, and we previously reported that commitment from employers to the monthly data collection process has been good. This continues to be borne out, however, for this quarter due to unplanned staff absence as previously referred to the high-level summary data on timeliness of submissions is not available. If possible, it will be circulated as a late addendum but there are no material changes in the position previously reported.
- 5.21 Fortunately, the vast majority of employers have continued to provide the monthly returns, and this is important because it is now directly linked to the collection of contributions via Direct Debit (see below).

Individual query employer reporting

- 5.23 Last year we started monitoring performance of employers in respect of responding to individual queries raised by SYPA. Examples of the sorts of queries raised with employers are the provision of 2008 Scheme Final Pay for leavers (where additional information is required beyond the CARE pay included on the monthly returns); confirmation of hours changes; confirmation of role changes, confirmation of pay for Annual Allowance purposes, etc.
- 5.24 The Board previously requested that the reporting be updated to reflect the actual performance of key employers and payroll providers for each quarter so that the trends could be more effectively monitored. **Appendix A** therefore shows the performance in recent quarters for the employers or payroll providers with the highest volumes of queries.
- 5.25 Members will be aware of ongoing dialogue between SYPA and Rotherham MBC payroll services in relation to the volumes of outstanding queries for employers for whom they provide a payroll support service and Rotherham MBC attended the last Board meeting to report on their improvement plans. It is clear that there has been progress in reducing the outstanding query volumes since the start of the financial year and regular meetings continue to take place between SYPA and Rotherham MBC to ensure they remain focused on delivering against their target of resolving the backlog by 31 March 2023.
- 5.26 Following the refining of the reporting, two payroll providers (Capita and EPM) appear on the list of employers/providers with high volumes of queries outstanding. Both organisations have recently undergone a number of personnel changes which have caused operational difficulties at their end and the Support and Engagement Manager and his team are continuing to liaise with the new contacts provided to ensure they understand their statutory responsibilities and to provide any training/support required.
- 5.27 Note that the case completion rates showing the percentage ‘in time’ are based on our own internal targets for expected response levels which are 5 working days for urgent queries and 20 working days for standard queries. It is also the fact that there is a direct relationship between the number of members an employer has and the number of queries. It would normally be expected that Sheffield CC as by some margin the largest employer would have more queries. However, following our earlier engagement Sheffield CC have now devoted significant resources to resolve the volumes of outstanding queries and their continued positive progress in reducing the numbers of queries outstanding should be noted.

Contribution Payments

- 5.28 Members may recall that SYPA moved to the collection of contributions via Direct Debit from April 2020. The table below shows the status of payments in respect of contributions due for the latest available three months, as well as the details of any outstanding payments. Of the remaining employers not yet signed up to Direct Debit, these are predominantly service contract providers with multiple ‘employer’ contracts where they have unusual pay cycles which do not fit neatly with the monthly collection process and we have temporarily agreed they can continue to pay by BACS.

6	Sept Payment Rcvd	Oct Payment Rcvd	Nov Payment Rcvd
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	Oct No.	Nov No.	Dec No.
Employers Paid by Direct Debit	509	509	510
Employers Paid on time by BACS	27	27	26
Payment received late by BACS or Direct Debit	3	2	3
Payment outstanding (see 5.29)	7	9	8

5.29 All of the above outstanding payments relate to new employers who have been processed recently and have yet to make their first data submission. Of the 10 new employers with outstanding submissions, 7 relate to one catering contractor. The numbers of outstanding submissions do not track to 10 exactly as two of the employers have made November submissions but not October, one of the employers only joined the scheme in November without submitting and the others have yet to submit anything from September. Issues of this sort are not uncommon with new employers (particularly contractors) and are being followed up by the Engagement Team.

Scheme Member Engagement – Customer Satisfaction

5.30 The Authority is always keen to improve engagement with our scheme members and to measure the levels of satisfaction with our service. Each month surveys are issued to members who have recently retired to understand their experiences. The table below shows the overall satisfaction levels from respondents to the survey issued to members who retired in August, September, and October 2022, who provided an email address.

Q. Overall, how satisfied are you with the service you receive from us?		Compared to last quarter	
Very Satisfied	57%	-3%	▼
Satisfied	34%	+5%	▲
Dissatisfied	8%	-1%	▼
Very Dissatisfied	1%	-1%	▼
Total Number of Respondents	97 out of 574 issued		

5.31 The percentage of members in the green category is back above 90% which is encouraging however some further analysis was carried out into the members who were dissatisfied to identify the root causes. The following comments were made:

- The online forms were not working so had to do by post.
- AVC options caused delays.
- I think it was a lack of information from our finance office to SYPA
- Uploading certificates was clumsy - there was no clear explanation if how to upload more than one.
- Reinstate face to face appointments. I only received information over the phone and portal, I would have like face-to-face advice.

5.32 Actions we have taken in response to this, and earlier feedback, are summarised below.

- Comments relating to forms and certificates are referring to our Deferred Retire Online process which is relatively new. It had come to light that some members struggled with the file types they were able to upload within the portal however this has recently been resolved. In addition, we will look at introducing some additional notes around the upload process.
- Face to face appointments are available to book online. Wherever possible we will contact the member by telephone ahead of an appointment to try and resolve their query without the need for a face-to-face appointment.

Scheme Member Engagement – Customer Centre – Telephone Calls

5.33 Members of the Board will be aware that the Customer Centre exists to provide a single point of contact for scheme members and employers. Feedback for the Customer Centre continues to be positive overall, despite the drop in satisfied responses. A survey was issued to 3,438 members, with an email address, who had contacted us by phone over the months of August, September, and October 2022 to ask about their experience of our service delivery and for ideas on service improvements. The results of the survey are shown below.

Q. Overall, how satisfied are you with the service you receive from us?		Compared to last quarter	
Very Satisfied	53%	-5%	▼
Satisfied	28%	-3%	▼
Dissatisfied	12%	+5%	▲
Very Dissatisfied	7%	+4%	▲
Total Number of Respondents	243 out of 3,438		

5.34 The percentage of members in the green category dropped to 81% which is disappointing, however analysis of the 19%, who were dissatisfied with the service, mainly highlight the issues below.

- Better training for staff, follow up calls to reassure customers that problems are being actively addressed.
- I would prefer paper statements as cannot remember passwords and login details.
- Don't use Western Union.
- We should have the option to opt of online documents. The online portal is extremely temperamental and difficult for SYPA teams to resolve technical issues.

5.35 Again, there are a mixture of comments however in response to the points above the following provides some context and outlines steps being taken to address the issues raised:

- The Customer Centre is staffed with relatively new members of the team. One member of staff with less than 3 months service, and another with less than 6 months. We are continuously building on the support, knowledge, and skills of staff in the team which will improve over time.
- In relation to comments around paper statements - online documents are our default option for all Annual Benefit Statements for active and deferred

members and P60s for retired members. However, members can request a paper copy at any time. We are also aware and understanding of the frustrations with the online portal and are continuously working hard to improve the service for members. One area we have already progressed is getting help online. We also successfully ran a couple of mypension sessions in person to help with the registration process, logging on issues and navigation around the site. Members were invited to bring their mobile devices to the session.

Scheme Member Engagement – Customer Centre Emails

5.36 Email is an important channel for many of our members and, since October 2020, we have been monitoring customer satisfaction levels with our email responses by embedding “click face” surveys into our email signatures. The table below shows the overall satisfaction levels for August, September and October 2022.

Q. Overall, how satisfied are you with the service you receive from us?		Compared to last quarter	
Excellent	61%	+7%	▲
Good	18%	-10%	▼
Ok	5%	-1%	▼
Poor	16%	+4%	▲
Total Number of Respondents	62 out of 7,118 emails sent		

5.37 Unfortunately, as always in this area the response rates are low and not all members provide further information, however the ones who leave details, we contact separately. The following comments were left by members who had rated the service poor:

- Delays with payment of benefits
- Struggling with the online portal.

5.38 After looking into the delay with benefits, this was unfortunately a third-party delay due to the member having AVCs. It took several requests to the AVC provider to receive payment of the fund value which was preventing the calculation of retirement benefits. To prevent any further delay, we offered to bring benefits into payment without the AVC and to re-calculate the benefits when the fund value was eventually received. This is usually the last resort option to avoid any overpayment of lump sum.

Member Engagement – online portal

5.39 We continue to encourage all scheme members (regardless of status) to sign up to use the online portal which was enhanced and expanded in 2019. There was a total of **3,120** new registrations in the quarter to the end of December bringing the total registrations to **81,520** (or 46.6% of the total membership), which based on the limited comparative information available seems to compare favourably with other LGPS funds. **Appendix B** shows how sign up to the portal has progressed over time.

Scheme Member Engagement – New Joiner Survey

5.40 As part of our wider engagement with scheme members, we wanted to gain some insight into how members who have recently joined the pension scheme rated our service. A survey was issued to 1,660 members who had joined the scheme in August, September and October 2022. The new joiner survey specifically asks

about the welcome email/letter, including registration of the online portal. The results of the survey are shown below.

Q. Overall, how satisfied are you with the service you receive from us?		Compared to last quarter	
Very Satisfied	17%	+4.5	▲
Satisfied	31%	-11.5	▼
Dissatisfied	31%	-6.5	▼
Very Dissatisfied	21%	+13.5	▲
Total Number of Respondents	42 out of 1,660 emails issued		

5.41 Worryingly again this quarter a large number of new members were not satisfied with the process and provided the following feedback.

- The form for transferring pensions could be in an online format rather than PDF.
- Online portal issues.
- It could be made clearer that I'd re-joined rather than joined.

5.42 A high percentage of members completing the survey said they hadn't yet received the welcome notification, which is clearly a concern. However, following similar comments from the last set of results, feedback has already been taken on board and measures put in place to address the issue. In November last year, new starters which are flagged within the monthly data collection files are now re-assigned to a priority work tray to ensure member records are being created and welcome information issued in a timely manner. These results should hopefully reflect in future survey results.

Other Engagement Activity

5.43 A range of other engagement and employer support activity was undertaken over the quarter which is summarised below to give the Board an idea of the range of activity undertaken by the Team in this increasingly important area.

- As part of "Talk Money Week" and Pensions Awareness Week we hosted 6 different employee presentations. These were linked to a range of social media campaigns including a 12 days of pensions campaign in the run up to Christmas.
- 7 employer training sessions were held
- Issue 10 of the Employer Newsletter was prepared (although it was actually published in early January)
- A calendar for future employer training has been published.
- Work has been undertaken to update the EPIC employer portal so that additional information on the progress of queries and the overall performance of employers can be more easily identified.
- Specifications have been completed for amendments to UPM processes for ill health retirement and appeals. While these await systems resources an ill health dashboard has been created.
- A new facility has been created for employers undertaking bulk redundancy exercises to estimate the costs of such exercises,
- A new data form has been created to improve the flow of data around retirements.

Annual Benefit Statements (ABS) and Pensions Savings Statements (PSS)

- 5.44 Previous reports have referred to the challenges experienced in delivering both Annual Benefit Statements and Pensions Savings Statements (required for a subset of members for tax purposes) on time. The last report referred to some particular challenges in regard to Pensions Savings Statements and an action plan to deal with this. While the action plan did result in most cases being assessed within the planned timescale a number of more complex cases particularly those involving inter-fund transfers have continued to be worked on. In addition, there remain some cases from previous years with outstanding issues and queries which need to be resolved. Given that these cases can be isolated into a single work package the Director has commissioned Hymans Robertson to resolve these outstanding cases as a matter of urgency in order to allow the operational teams to concentrate on preparing for the 2023 statements. It is worth noting that we expect to have to assess significantly more cases and issue significantly more statements than in previous years due to the impact of the current high level of inflation on the calculations.
- 5.45 The situation we have experienced while the result of a range of previously reported issues has clearly meant that the level of service we have provided to scheme members has not been what we would have wished although it should be emphasised that staff have made considerable efforts to deal with individual cases. It is expected that a number of complaints will be received in the next quarter which will be dealt with individually as they arrive.
- 5.46 One of the major causes of the issues that we have experienced is the fact that as previously reported the UPM system cannot produce the relevant calculations. A new release currently in testing contains updates which are intended to provide this functionality, and this is one of the two immediate priorities being worked on by the Pensions Systems Team.
- 5.47 Work has already commenced on the project to deliver the Annual Benefit Statements for 2023 which is being supported by the new Programmes and Performance Team. This work will include the process for producing Pensions Savings Statements which is in effect a consequential output of the Benefit Statements. The project brief includes a requirement to provide senior management with weekly management information in relation to key parts of the process which will provide better transparency on the progress being made and allow earlier intervention when problems or issues are identified.

Triennial Valuation

- 5.48 All employer results have now been issued, although largely in early January rather than before Christmas as planned and discussions are taking place with individual employers in order to resolve queries and deal with requests for the phasing of increases or pre-payments. While it had been hoped that discussions of this sort could be dealt with entirely in house unplanned absence means that we are having to rely on the actuary to assist with this which will increase the cost of the process but is unavoidable. The final Rates and Adjustments Certificate will be presented at the Authority's March meeting and the Board will have an opportunity to discuss the results in April.

Implications

- 6.1 The proposals outlined in this report have the following implications:

Financial	None
Human Resources	None
ICT	None
Legal	None
Procurement	None

George Graham

Director

Background Papers	
Document	Place of Inspection