

Administration Performance Report – July 2025 - Appendix 1

Category	Outstanding at Period Start	Created in Period	Total Cases	Complete at End of Period	Outstanding at End of Period	% Complete	Outstanding (Excluding External Reply Due)	Outstanding (External Reply Due)	Outstanding cases - Increase/decrease	Amount Increased/decreased
Deaths	64	139	203	150	53	73.9%	32	21	Decrease	-11
Survivors Pensions	75	53	128	57	71	44.5%	35	36	Decrease	-4
Death Grant Payment	31	30	61	34	27	55.7%	19	8	Decrease	-4
Payment of Retirement Benefits	395	298	693	297	396	42.9%	232	164	Increase	1
Estimate of Retirement Benefits	549	500	1,049	518	531	49.4%	379	152	Decrease	-18
Refunds	3,493	283	3,776	519	3,257	13.7%	1,986	1,271	Decrease	-236
Deferred Benefits	7,242	217	7,459	538	6,921	7.2%	5,223	1,698	Decrease	-321
LGPS Transfer In	382	12	394	26	368	6.6%	312	56	Decrease	-14
LGPS Transfer Out	696	68	764	73	691	9.6%	553	138	Decrease	-5
Aggregation	12,331	455	12,786	453	12,333	3.5%	10,537	1,796	Increase	2
Non LGPS Transfer In	47	27	74	49	25	66.2%	18	7	Decrease	-22
Non LGPS Transfer Out	131	32	163	44	119	27.0%	63	56	Decrease	-12
Divorces	51	35	86	57	29	66.3%	13	16	Decrease	-22
General Correspondence	116	663	779	724	55	92.9%	41	14	Decrease	-61
Change of Details	9	362	371	358	13	96.5%	1	12	Increase	4
Lost Pension	27	37	64	37	27	57.8%	14	13	Increase	0
New Joiners	2,156	1,541	3,697	1,070	2,627	28.9%	2,626	1	Increase	471
Opt Outs	410	39	449	66	383	14.7%	223	160	Decrease	-27
Grand Total	28,205	4,791	32,996	5,070	27,926	15.4%	22,307	5,619	Decrease	-279

Category	Subcategory	Complete at End of Period	# Completed Within KPI Target	% Complete Within KPI Target	# Completed Within Legally Required Response Time	% Complete Within Legal Target
Deaths	Initial Death Notification	150	139	92.7%	147	98.0%
Survivors Pensions	Survivors Pensions Pensioner or Deferred Pensioner (Actual)	48	36	75.0%	45	93.8%
	Survivors Pensions Death in Service (Actual)	3	3	100.0%	3	100.0%
	Survivors Pensions (Estimate)	6	5	83.3%	6	100.0%
Death Grant Payment	Death Grant Payment (Pensioner, Deferred Pensioner, Death in Service)	34	31	91.2%	32	94.1%
Payment of Retirement Benefits	Payment of Retirement Benefits for Active members (Actual)	120	72	60.0%	118	98.3%
	Payment of Retirement Benefits for Deferred Benefit members (Actual)	177	141	79.7%	175	98.9%
Estimate of Retirement Benefits	Estimate of Retirement Benefits for Active members	205	172	83.9%	201	98.0%
	Estimate of Retirement Benefits for Deferred Benefit members	313	294	93.9%	309	98.7%
Refunds	Notification of Refund Entitlement	415	118	28.4%	118	28.4%
	Payment of Refunds	104	101	97.1%	104	100.0%
Deferred Benefits	Provision of Deferred Benefit Statements	538	91	16.9%	91	16.9%
LGPS Transfer In	LGPS Transfer In Estimates	11	2	18.2%	5	45.5%
	LGPS Transfer In Actuals	15	0	0.0%	2	13.3%
LGPS Transfer Out	LGPS Transfer Out Estimates	42	17	40.5%	31	73.8%
	LGPS Transfer Out Actuals	31	2	6.5%	9	29.0%
Aggregation	Aggregation In Estimates	85	20	23.5%	24	28.2%
	Aggregation In Actuals	367	111	30.2%	111	30.2%
	Reversal of Auto Aggregation	1	0	0.0%	0	0.0%
Non LGPS Transfer In	Non LGPS Transfer In Estimate	36	15	41.7%	31	86.1%
	Non LGPS Transfer In Actual	13	10	76.9%	11	84.6%
Non LGPS Transfer Out	Non LGPS Transfer Out Estimate	38	32	84.2%	36	94.7%
	Non LGPS Transfer Out Actual	6	1	16.7%	4	66.7%
Divorces	Pension Sharing on Divorce Estimates	57	52	91.2%	57	100.0%
	Pension Sharing on Divorce Implementations	0	0		0	
General Correspondence	General Correspondence with scheme members	724	676	93.4%	717	99.0%
Change of Details	Change of Scheme Member Details	358	357	99.7%	357	99.7%
Lost Pension	Lost Pension	37	34	91.9%	37	100.0%
New Joiners	New Starters to the Scheme	1,070	939	87.8%	939	87.8%
Opt Outs	Opt Outs under 3 months	66	25	37.9%	31	47.0%