

Pensions Administration - Appendices

Appendix 1 – Member Communications Activity

Member communication			
	Mar-26	Feb-26	Jan-26
Emails triaged	5,180	4,879	4,943
Email correspondence	2,034	2,073	1,764
Calls handled	1,251	11	1,266
Adare returned post	26	44	28

Telephone survey - Voice of the Customer			
	Mar-26	Feb-26	Jan-26
Qualifying calls	1,404	1,308	1,379
Survey tasks created	543	547	385
Survey tasks returned	152	138	133
Positive feedback	96.7	95.6%	98.5%
Queries answered at point of contact	96.7%	92.7%	98.4%
Call backs received	79%	99.3%	100%

Comments: Voice of the Customer highlights:

- What an absolute delight dealing with the team. They were so helpful, so happy, nothing was too much trouble. What a credit they are to you.
- Person really helped with my questions and form. She came across very caring and professional.
- The gentleman I spoke with was very lovely and informative.

- Your member of staff was brilliant, she explained everything in detail and easy to follow, answered all my questions to the full.
- Very helpful, made me feel at ease and safe to ask questions. Their time and kindness was really appreciated

Appendix 2 – Team Performance

Key Performance Indicators						
	Jan-26		Feb-26		Mar-26	
Retirement Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Active members	108	97.2	83	95.2	93	94.6
Deferred members	140	95.7	189	95.2	214	94.9
Refund notifications	271	62	179	84.9	195	68.2
Refund payments	74	94.6	101	91.1	114	81.6
Opt outs	90	95.6	19	73.7	16	43.8

Commentary - Retirements

Jan- Mar Retirements - Overtime used on occasions which has helped to keep the KPIs at the expected level. This has been especially helpful for checking, where there is slightly less cover.

We have been front ending casework up until PI date, from them we had to postcheck cases and stockpile them on the FUTKPI user until PI had run and we could process again.

Refunds - Rota work for the PAs having an impact on the volume of cases that we can process on the team during Feb. Training in March has provided additional resource to help move cases on again.

Gradual increase in the number of refunds processed following increased volumes of defrefs being processed in previous months.

Checking refunds has been harder to resource, so this has dipped slightly. However, all chasers are prioritised and checking volumes in the checking bucket staying consistent.

Key Performance Indicators						
	Jan-26		Feb-26		Mar-26	
Estimate Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Active members	139	94.2	141	93.6	220	98.6
Deferred members	316	95.9	257	92.6	377	96.3
DB's	201	73.6	261	69	436	89
Divorce - quotes	39	94.9	62	100	46	100
Divorce actual	3	100	0		1	100
Lost pension	58	99.2	68	85.3	105	85.7

Commentary - Estimates Team

January - KPIs in a good position overall. DBs dipped as we have started to focus on reducing the backlog of reply due cases.

February - KPIs remain in a good position. Continuing to work on reducing the backlog of reply due DBs.

March - All KPIs improved this month, largely due to resource being available from the Agg team. Almost double the amount of DBs processed and good progress on the reply due cases has led to a significant improvement in this area.

Key Performance Indicators	Jan-26		Feb-26		Mar-26	
	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Death Team						
Survivors - Def/Pensioner	59	79.7	51	86.3	71	78.9
Survivors - DIS	3	66.7	0		4	100
Initial deaths	161	89.4	113	92	149	89.3
Survivors - estimates	7	100	6	83.3	9	77.8
Death Grant payments	27	100	16	93.8	27	92.6

Commentary - Death Team

January – some of the KPIs dropped due to on team training and annual leave. The KPIs would have been in a worse position if we had not used overtime to alleviate some of the resourcing issues.

February – some of our checking resource was given over to other teams for urgent cases that only the death team resource could check. Training took place at all levels so processing and checking was slower initially. Lots of annual leave across the team. We were given resource from the Agg team during blackout which helped keep our KPIs up.

March – didn't have much resource on team who could do death in service or death of DBs, Agg team resource helped with this but a chunk of the KPI had already been eaten up while these cases were identified. More annual leave across the team as well as sickness. Recent training meant cases were taking longer to process. Continued to receive resource from the Agg team during blackout otherwise our KPIs would have been worse.

Key Performance Indicators						
	Jan-26		Feb-26		Mar-26	
Transfer/Interfund Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Interfund In Estimates	0	0	0	0	4	0
Interfund In Actuals	17	29.4	2	0	10	40
Interfund Out Estimates	83	31.3	23	56.5	23	56.5
Interfund Out Actual	35	17.1	11	9.1	19	15.8
Transfer In Estimates	14	35.7	7	71.4	16	62.5
Transfer In Actuals	1	0	3	33.3	5	60
Transfer Out Estimates	81	45.7	32	78.1	34	82.4
Transfer Out Actual	7	28.6	4	50	6	16.7
New Starters	918	43.1	1105	74.2	1921	98.9

Commentary - Transfer/Interfund team

January – An increase of cases were completed this month as training was delivered on multiple subjects and cases were also completed for competency and embedding the knowledge of these subjects.

February – T&I had reduced resource from February as a Pension officer moved work teams and no replacement added which had an impact on work completed.

March – Due to year end approaching in March, new starters were kept more on top of so that starters were on Altair ready for year end processing. Process improvements for new starters have also started to be implemented to make use of automation and time savings were made which enabled cases to be within KPI and for more cases to be completed.

****Note-** Interfund In Estimates do not show the completed cases correctly as the KPI reporting has not picked up cases on reply due that we have issued an estimate to member. Workflow to be amended and correct cases should be included for new cases with effect from 20.04.2026**

Key Performance Indicators						
	Jan-26		Feb-26		Mar-26	
Aggregation Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Aggregation estimates	65	72.3	21	95.2	17	94.1
Aggregation actuals	360	65	181	66.3	6	100
Reversal of auto agg	33	6.1	15	26.7	0	

Commentary - Aggregation Team

Jan: With the start of the agg team there was a push on ERN changes, and Overtime was being used for these as well. This helped us to get into a better position with the KPIs, though still not perfect.

Group training for D Aggregation Quotes was undertaken in January, this cleared us out of D Aggregation quotes, so we are now able to work on these as the cases come in.

February - April: An Aggregation blackout came in on 9th February, which means that no aggregation actuals could be processed. Therefore there was a significant drop in cases completed as only the really urgent cases were worked on. The extended duration of this blackout will also have a negative effect on KPIs going forwards as the cases have currently doubled during this time.

Agg blackout does not affect the quotes, so we have continued to work on those.

However as we cleared D Agg Quotes with the group training, we are now completing D Agg quotes as they come in. Case volumes are low so there aren't as many cases being completed, but the KPIs are good. C Agg quotes have currently been on hold due to lack of resource and confidence, as well as the need for manual calcs until McCloud is on.

When we resume these, this will likely have a negative effect on the KPIs - volumes of C Agg Quotes aren't too high, but most are now out of date.

Appendix 3 – Backlog Progress Update

Case Type	Tender	Processed	Complete - Billed	% processed v tender	% complete v tender
Leaver - Aggregation	7,932	1,422	1,336	17.93%	16.84%
Leaver - Deferment	6,465	1,833	1,815	28.35%	28.07%
Leaver - Refund	2,811	441	390	15.69%	13.87%
Leaver - Concurrency	2,449	302	299	12.33%	12.21%
Interfund in	2,417	295	150	12.21%	6.21%
Interfund out	650	74	46	11.38%	7.08%
Leaver - Opt Out	289	Included in deferment and refund reporting			
Total	23,013	4,367	4,036	18.98%	17.54%

Appendix 4 – Member engagement

Month	Emails	Calls	1:1 visits	Website Visits	MyPension Online (MPO) registration queries
Jan	1,764	1,294	1	13,848	586
Feb	2,073	1,345	0	13,413	488
Mar	1,980	1,326	1	14,084	517

Appendix 5 – MyPension Online Registrations

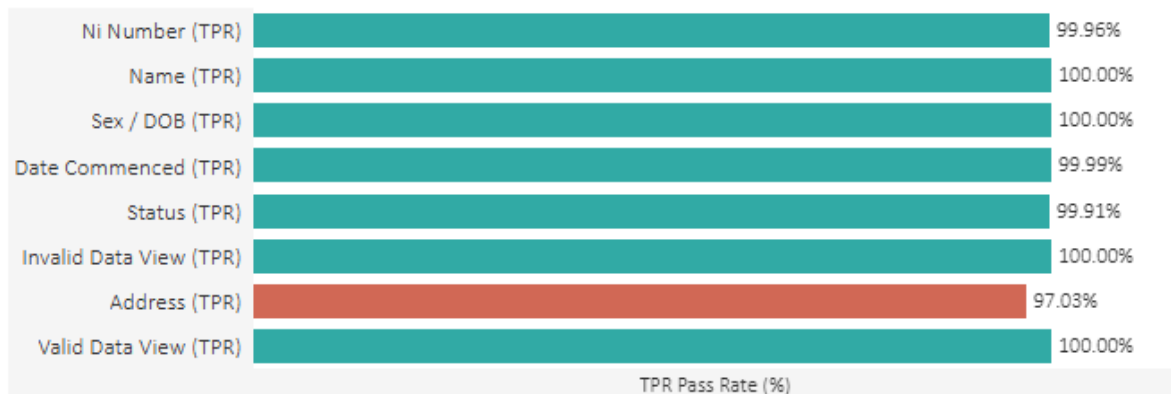
	Unique member records				Employment records		
	Jan	Feb	Mar		Jan	Feb	Mar
Active	19,915	19,207	19,476		20,523	20,867	21,157
Deferred	9,456	9,785	10,072		10,617	10,994	11,322
Pensioner	9,595	9,812	10,131		11,118	11,384	11,776

Appendix 6 – Data Quality

Data Type	TPR Pass Rate %	
	Oct – Dec	Jan – Mar
Common	97.90	98.00
Scheme Specific	97.82	83.15

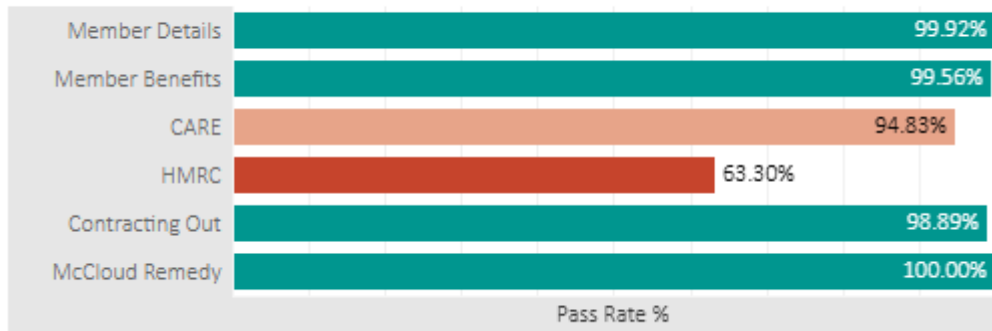
Common Data:

TPR Pass Rate % by Test Category



Scheme Specific Data:

Grand Total | TPR Pass Rate % by Test Category



Appendix 7 – Training and Development

In house training sessions	30
Sessions led by Training Officers	23

Appendix 8 – Complaints, Compliments and Comments

	Complaints	Comments	Compliments
Jan	0	4 Poor communication	6 3 x good communication 3 x helpful staff
Feb	1 Disagreement with decisions or policies made	3 2 x poor communication 1 x Service Delivery (third party supplier, contracted service provider)	2 Good communication
Mar	1 Service Delivery (third party supplier, contracted service provider)	2 Poor communication	3 Good communication