


# *Pension Administration Performance Indicators 2024/25 – Quarter 1*




# Durham County Council Pension Fund Administration 2024/25 Q1




**Pensions Online Portal**  
**17,429** log ins Q1




**Pensions Helpline**  
**4,083** Calls in Q1



**Retirements 2024/25**  
**286** in Q1



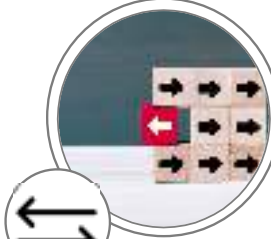
**Funding Level**  
**98%**



**Processing Performance**  
**96.13%**



**Member Online Calcs**  
**55,872** in total



**Transfers calculated**  
**33** in Q1



**Monthly Pensions**  
**£12m** payroll

\*



\*Measures in Fund's control, excluding self-service (ie. weighted average of local KPIs A2, A3, A5)

# *Local Performance Indicators*



# 2024/25 Service Key Performance Indicators

## Local KPI monitoring: A – Casework Processing

Key Performance Indicators		Performance Target	Total Cases Q1 2024/25	Performance Q1 2024/25	Performance 2023/24	Performance 2022/23	Performance 2021/22
A1	<b>Retirements Disclosure</b> - Within two months of retirement provide a statement containing retirement benefit information.	100%	286	82.87%	81.94%	82.61%	86.65%
A2	<b>Retirements in Fund's Control</b> - Within 10 days of receiving all required information provide a statement containing retirement benefit information.	100%	286	95.10%	98.23%	98.47%	98.99%
A3	<b>Deferment Disclosure</b> - Within one month of being notified of a leaver, provide that member information as to the rights and options available.	100%	263	97.34%	96.07%	95.91%	86.70%
A4	<b>Transfers out Disclosure</b> - Within one month of a request, provide that member information as to the transfer rights and options available.	100%	33	100%	100%	99.22%	-
A5	<b>Transfers out Quotation</b> - Within three months of a request, provide a quotation of the cash equivalent transfer value to which a member is entitled.	100%	21	95.24%	93.00%	99.22%	-
A6	<b>Estimates</b> - Within two months of a request, provide a statement* of estimated pension entitlement online or in writing.	100%	3,933	100%	100%	100%	-

# 2024/25 Service Key Performance Indicators

## Local KPI monitoring: B – Communications & Engagement

Key Performance Indicators		Total Cases Q1 2024/25	Performance Target	Performance 2024/25	Performance 2023/24	Performance 2022/23	Performance 2021/22
<b>B1</b>	<b>Pensions Helpline</b> - Calls from Scheme Members answered first time	<b>4,083</b>	<b>100%</b>	<b>99.10%</b>	99.30%	99.40%	98.47%
Key Performance Indicators			Total Registrations to date	Total Online Calculations Completed	Total Self-Service Online Changes	Secure messages sent Through Portal	
<b>B2</b>	<b>Online Portal Since Launch</b> - Total Registrations & Activity through Pensions Online portal ( <a href="https://pensionsonline.durham.gov.uk/">https://pensionsonline.durham.gov.uk/</a> )		<b>26,116</b>	<b>55,872</b>	<b>21,872</b>	<b>4,398</b>	
Key Performance Indicators			Total Log ins 2024/25 Q1	Individuals logging in 2024/25 Q1	Total Log ins during 2023/24	Individuals logging in 2023/24	
<b>B3</b>	<b>Online Portal in Year</b> - Total logins through Pensions Online portal during year ( <a href="https://pensionsonline.durham.gov.uk/">https://pensionsonline.durham.gov.uk/</a> )		<b>17,429</b>	<b>5,808</b>	52,931	9,142	
Key Performance Indicators			Performance Target	Performance 2023/24	Performance 2022/23	Performance 2021/22	
<b>B4</b>	<b>Annual Benefit Statements</b> – Statements made available online* by 31 <sup>st</sup> August for active members known to the Fund		<b>100%</b>	<b>100%</b>	100%	100%	

\*paper copies made available to those opting out of online services

# ***LGPS Scheme-Standard Performance Indicators***



# Service Performance Indicators 2024/25

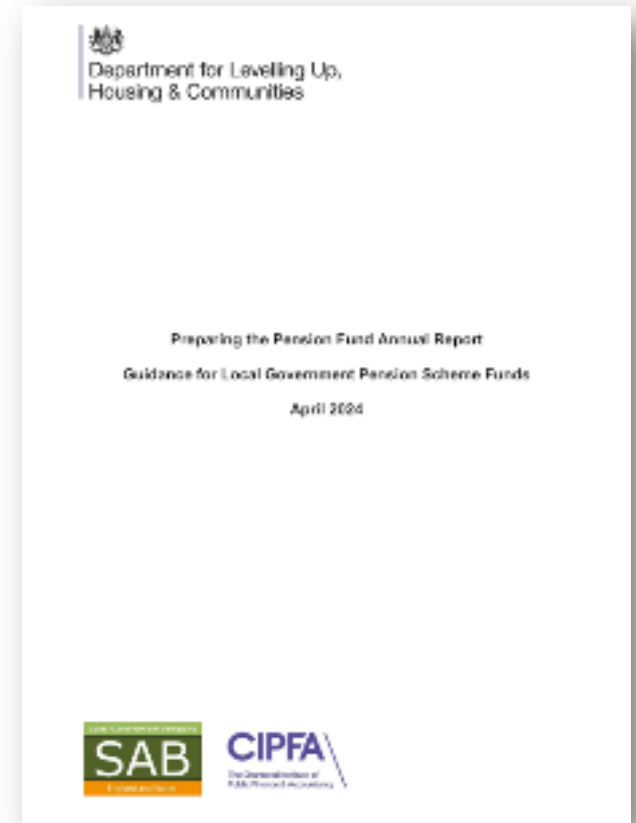
## Performance Requirements based on:

The updated guidance for preparing the LGPS Fund Annual Report contains provisions for standardised performance indicators to be used across the LGPS in England and Wales. This guidance is the first publication which has been reviewed and jointly approved by the SAB's Compliance and Reporting Committee (CRC), the Chartered Institute of Public Finance and Accountancy (CIPFA) and the Department for Levelling Up, Housing and Communities (DLUHC). It replaces the 2019 guidance produced by the CIPFA Pensions Panel, which was disbanded in 2021.

The new guidance applies to 2023/24 annual reports which are due for publication by 1 December 2024, and later years. The guidance says that funds should use their *best endeavours* to comply with the requirements for 2023/24 but exercise judgement where, because of changes to the previous content, to do so would require disproportionate effort or cost. The guidance will be kept under regular review.

The guidance is available online at:

<https://lgpsboard.org/images/Guidance/Annual%20Report%20Guidance%202024.pdf>



# Service Performance Indicators

## 2024/25 Scheme-Standard KPI monitoring

### B – Casework Processing Time – Q1

Key Performance Indicators		Proposed Target Days	% completed within fund target in year	% completed in previous year
<b>B1</b>	Communication issued with acknowledgement of death of active, deferred, pensioner and dependent member	5 days	<b>90.76%</b>	-
<b>B4</b>	Communication issued to active member with pension and lump sum options (quotation)	15 days	<b>98.23%</b>	-
<b>B5</b>	Communication issued to deferred member with confirmation of pension and lump sum options	15 days	<b>97.28%</b>	-
<b>B6</b>	Communication issued to active member with confirmation of pension and lump sum options	15 days	<b>99.52%</b>	-
<b>B7</b>	Payment of lump sum (both actives and deferreds)	15 days	<b>98.47%</b>	-
<b>B8</b>	Communication issued with deferred benefit options	30 days	<b>97.34%</b>	-



# Service Performance Indicators

## 2024/25 Scheme-Standard KPI monitoring

### B – Casework Processing Time – Q1

Key Performance Indicators		Proposed Target Days	% completed within fund target in year	% completed in previous year
<b>B9</b>	Communication issued to scheme member with completion of transfer in	15 days	<b>100%</b>	-
<b>B10</b>	Communication issued to scheme member with completion of transfer out	15 days	<b>100%</b>	-
<b>B11</b>	Payment of refund	10 days	<b>87.50%</b>	-
<b>B12</b>	Divorce quotation	45 days	<b>100%</b>	-
<b>B15</b>	Member estimates requested by scheme member and employer	15 days	<b>100%</b>	-