



LOCAL PENSION BOARD - 4 FEBRUARY 2026

REPORT OF THE DIRECTOR OF CORPORATE RESOURCES

PENSION FUND KEY PERFORMANCE INDICATORS REPORT

Purpose of the Report

1. The purpose of this report is to present for the Board proposed improvements to how workloads and key performance indicator data is presented in the quarterly administration report, whilst also aligning that data with the requirements of the Fund's annual report.

Background

2. A regular administration report is presented to the Board that includes information relating to the performance of the Pension Section and their administrative casework in the previous quarter.
3. The report's 'General Workloads' section contains details of the volumes in each work area during the quarter. The table details numbers of cases completed and those ready for processing.
4. There is also a table shown in the appendix detailing performance against the Section's Key Performance Indicators (KPIs). These are split into two categories, 'Business Process Perspective', covering performance in respect of retirement and death cases, and 'Customer Perspective – Feedback', which measures member satisfaction levels.
5. This information is also used by the Pension Manager and the Team Managers to assess workloads, highlight areas of concern more quickly and enable internal resource to be moved as required. Monthly updates are circulated to all Pensions staff for awareness.
6. The annual position regarding workloads and KPIs are also published in the Fund Annual Report. However, the requirements have recently changed and there are additional areas to include that are not included in the data sent to the Board.

Proposed Approach

7. Officers have begun to review whether the data is presented in a manner that is clear and useful to the Board. Additionally, following changes in the requirements for the Fund Annual Report, whether the data presented to the Board aligns with those requirements.
8. For consistency, Officers would like to provide quarterly information to the Board that aligns with those new Annual Report requirements, but without losing any of the categories that are currently being provided.
9. It is proposed that the Workloads section will now show one quarterly table and not three-monthly tables as is currently the case.
10. Key points to note:
 - a. The number of workload areas will increase from 10 to 14 to align with the requirements of the Fund's annual report;
 - b. The columns will display number of cases completed in the quarter and the number of cases that remain. The percentage of cases completed will also be shown;
 - c. All retirements will be grouped as one. Whilst the Annual Report will require a split between active and deferred retirements, officers propose to continue to group these two elements as one, which is the current approach, for consistency. However, the annual report will split these areas into two.
11. The KPIs for the quarter will continue to be included in the appendix but expanded to align with the requirements for inclusion in the Annual Report as well as the areas currently measured.
12. The appendices to this report shows the existing format and data that is currently used in the administration report (Appendix A), the requirements for the Annual Report (Appendix B) and the proposed layout for future Board reports (Appendices C and D).
13. The Board is asked to consider the proposed layout shown in Appendices C and D.
14. Once the approach is agreed officers will work through the implementation of these changes. This will include a wider review of all casework 'workflow' processes that are used on the Altair administration system to ensure that they are compatible with all reporting requirements.
15. Workflow processes are created in Altair and are used to monitor the status of outstanding work. This includes whether a case is with the employer, pension

officer or manager for checking. Workflow data is used to provide the figures used in the Board reports.

16. Many of the original workflows were created many years ago and whilst quite simple, have served their purpose. However, as reporting requirements evolve, it is now considered that many existing workflows may need to change.
17. Once the workflows are revised, new reports will be created. Finally, KPI targets for the new areas will be considered and added to the new layout.

Recommendation

18. The Board is asked to comment on the proposed approach as outlined in Appendices C and D.

Equality and Human Rights Implications

None specific

Appendices

Appendix A: Existing Reporting Formats

Appendix B: Annual Report Requirements

Appendix C: Proposed Approach for Future Board Reports (Workloads)

Appendix D: Proposed Approach for Future Board Reports (KPIs)

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