

KPI - WESTMINSTER CITY COUNCIL PENSION FUND - April to July 2016

Description	Target time/date as per Partnership Agreement	Target	Actual Score April 2016	Actual Score May 2016	Commentary on late cases	Actual Score June and July 2016	Commentary
PENSION ADMINISTRATION							
DEATH BENEFITS							
Notify potential beneficiary of lump sum death grant	5 days	100%	100.0%	100.0%		100.0%	
Write to dependant and provide relevant claim form	5 days	100.0%	100.0%	100.0%		100.0%	
Set up any dependants benefits and confirm payments due	14 days	100%	100.0%	100.0%		100.0%	
RETIREMENTS							
Retirement options issued to members	5 days	100%	77.0%	67.0%	Represents less than 5 cases but additional resource to be allocated to this area following recent recruitment campaign and reorganisation. Improvement expected for Q2	77.0%	3 cases completed late
New retirement benefits processed for payment following receipt of claim forms	5 days	100%	83.0%	94.0%		82.0%	4 cases completed late
REFUNDS OF CONTRIBUTIONS							
Refund paid following receipt of claim form	14 days	100%	100.0%	100.0%		100.0%	
DEFERRED BENEFITS							
Statements sent to member following receipt of leaver notification	30 days	100%	See note	See note	Timescales are not measured accurately currently as exercise is now being undertaken to bring records up to date following bulk submissions of leaver forms from BT/WCC	See note	Timescales are not measured accurately currently as exercise is now being undertaken to bring records up to date following bulk submissions of leaver forms from BT/WCC
NEW JOINERS							
New starters processed	30 days	100%	98.0%	100.0%		100.0%	Note only low numbers processed pending receipt of interface file
TRANSFERS IN							
Non LGPS transfers-in quotations	30 days	100%	100.0%	100.0%		100.0%	
Non LGPS transfers-in payments processed	30 days	100%	100.0%	100.0%		100.0%	
TRANSFERS OUT							
Non LGPS transfers-out quotations processed	30 days	100%	100.0%	100.0%		100.0%	Low numbers processed pending system updates following revised GAD guidance
Non LGPS transfers out payments processed	30 days	100%	100.0%	100.0%		100.0%	
Monthly Pensioner Payroll							
Full reconciliation of payroll and ledger report provided to WCC	Last day of month		Achieved	Achieved		Achieved	
Issue of monthly payslips	3 days before pay day		Achieved	Achieved		Achieved	
RTI file submitted to HMRC	3 days before pay day		Achieved	Achieved		Achieved	
BACS File submitted for payment	3 days before pay day		Achieved	Achieved		Achieved	
Annual Exercises			Date Achieved				
ANNUAL BENEFIT STAEMENTS							
Issued to Active members	31 August each year		On target				On target
ANNUAL BENEFIT STAEMENTS							
Issued to Deferred members	31 August each year		On target subject to Government decision on 2015 revaluation				On target subject to Government decision on 2015 revaluation
P60s Issued to Pensioners							
Non LGPS transfers-in quotations processed within 20 days	31 May each year		May				
Apply Pensions Increase to Pensioners	April each year		April				
Pensioners Newsletter	April each year		April				
CUSTOMER SERVICE							
	Number of Respondents	% of Members who rated our service overall as excellent, very good or good					
Survery issued to all members who had retired since 1 September 2014	40	93%					