

PROPOSED NEW LAYOUT

Description	Target time/date as per Partnership Agreement	Target	Actual Score for Quarter	Commentary	Quantity (how many cases actioned)	Indicative Figures of Volumes from Q2	Comments
PENSION ADMINISTRATION							
DEATH BENEFITS							
Notify potential beneficiary of lump sum death grant	5 days	100%	%			8	
Write to dependant and provide relevant claim form	5 days	100%	%			6	
Set up any dependants benefits and confirm payments due	14 days	100%	%			5	
RETIREMENTS							
Retirement options issued to members	5 days	100%	%			24	
New retirement benefits processed for payment following receipt of all necessary documents	5 days	100%	%			27	
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%			27	
REFUNDS OF CONTRIBUTIONS							
Refund paid following receipt of claim form	14 days	100%	%			40	
DEFERRED BENEFITS							
Statements sent to member following receipt of leaver notification	30 days	100%	%			Less than 20	Will increase once leaver forms received from BT/employers
DEFERRED PAYMENTS							
Notification to members 3 months before payments due	3 months		%			36	
Lump Sum (on receipt of all necessary documentation)	5 days		%			30	
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%			30	
NEW JOINERS							
New starters processed	30 days	100%	%			44	Will increase once interface issues resolved
TRANSFERS IN							
Non LGPS transfers-in quotations	30 days	100%	%			Less than 10	Will increase now GAD guidance issues resolved
Non LGPS transfers-in payments processed	30 days	100%	%			Less than 10	
TRANSFERS OUT							
Non LGPS transfers-out quotations processed	30 days	100%	%			22	
Non LGPS transfers out payments processed	30 days	100%	%			Less than 5	
ESTIMATES							
1-10 cases	5 Days		%			50	
11-50 cases	Agreed with WCC		%				
51 cases or over	Agreed with WCC		%				
MATERIAL CHANGES							
Any changes to data which materially affect actual or potential benefits to be processed within 30 days of receiving all necessary data	30 days		%			New measure TBC	
BUYING ADDITIONAL PENSIONS							
Members notified of terms of purchasing additional pension	15 days		%			New measure TBC	
Monthly Pensioner Payroll							
Full reconciliation of payroll and ledger report provided to WCC	Last day of month						
Issue of monthly payslips	3 days before pay day						
RTI file submitted to HMRC	3 days before pay day						
BACS File submitted for payment	3 days before pay day						
P35							
	EOY						
Annual Exercises							
ANNUAL BENEFIT STATEMENTS							
Issued to Active members	31 August each year						
Issued to Deferred members	31 August each year						
P60s Issued to Pensioners							
Non LGPS transfers-in quotations processed within 20 days	31 May each year						
Apply Pensions Increase to Pensioners	April each year						
Pensioners Newsletter	April each year						
CUSTOMER SERVICE							
CORRESPONDENCE							
Acknowledgement if more than 5 days	2 days						
Response	10 days						
3rd party enquires	10 days						
Helpdesk Enquiries							
Volumes of Enquiries Handled By Helpdesk	Number of Enquiries Handled						
Customer Surveys							
Monthly survey to retirees	Percentage Satisfied with Service						