

Description	Target time/date as per Partnership Agreement
PENSION ADMINISTRATION	
DEATH BENEFITS Notify potential beneficiary of lump sum death grant	5 days
Write to dependant and provide relevant claim form	5 days
Set up any dependants benefits and confirm payments due	14 days
RETIREMENTS Retirement options issued to members	5 days
New retirement benefits processed for payment following receipt of all necessary documents	5 days
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run
REFUNDS OF CONTRIBUTIONS Refund paid following receipt of claim form	14 days
DEFERRED BENEFITS Statements sent to member following receipt of leaver notification	30 days
DEFERRED PAYMENTS	
Notification to members 2 months before payments due	3 months
Lump Sum (on receipt of all necessary documentation)	5 days
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run
NEW JOINERS New starters processed	
30 days	
TRANSFERS IN Non LGPS transfers-in quotations	
30 days	
Non LGPS transfers-in payments processed	30 days
TRANSFERS OUT Non LGPS transfers-out quotations processed	30 days
Non LGPS transfers out payments processed	30 days
Interfunds In - Quotations	30 days
Interfunds In - Actuals	30 days
Interfunds Out - Quotations	30 days
Interfunds Out - Actuals	30 days
ESTIMATES	
1-10 cases	5 Days
11-50 cases	Agreed with WCC
51 cases or over	Agreed with WCC

Actual Score September to November 17	No of Cases September to November	Comments
	0	
100%	6	
100%	4	
94%	16	1 case late
100%	16	
95%	39	
100%	28	
100%	89	
100%	62	
97%	39	
100%	39	
100%	62	
NA	0	
100%	23	
100%	6	
NA	0	
NA	0	
96%	53	
100%	7	
100%	46	
NA	NA	
NA	NA	

Actual Score Dec 2017	No of cases Dec 2017
100%	1
100%	4
NA	0
100%	7
100%	3
100%	3
100%	1
86%	7
100%	18
100%	10
100%	10
100%	5
0	1
NA	0
100%	5
100%	1
100%	1
NA	0
NA	0
100%	6
100%	6
NA	0
N/A	
N/A	

Actual Score Jan 2018	No of Cases January 2018	Target	Trend	Comment
100%	1	100%		
100%	6	100%		
100%	2	100%		
100%	6	100%		
100%	10	100%		
100%	10	100%		
100%	3	100%		
100%	14	100%		
100%	24	100%		
100%	11			
100%	11	100%		
100%	16	100%		
100%	1			
NA	0	100%		
100%	6	100%		
100%	1	100%		
NA	0	100%		
NA	0	100%		
100%	8	100%		
100%	3			
100%	6			
NA				
100%	6			
N/A			NA	
N/A			NA	

Updated Pension KPI January 2018

Description	Target time/date as per Partnership Agreement
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
BUYING ADDITIONAL PENSIONS	
Members notified of terms of purchasing additional pension	15 days
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	
Annual Exercises	
ANNUAL BENEFIT STATEMENTS Active members	31 August each year
ANNUAL BENEFIT STATEMENTS Deferred members	31 August each year
P60s Issued to Pensioners	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	
Survey to retirees	Percentage Satisfied with Service

SEPTEMBER TO NOVEMBER REPORTING

Actual Score September to November 17	No of Cases September to November	Comments
100%	137	
NA	NA	
100%		
100%		
100%		
100%		
Annual		
Annual		N/A
Annual		N/A
Annual		Issued April 2017
Annual		
Annual		Issued April 2017
98%	45	
NA	NA	
	940 (representative of 2 months)	89% FPF rate

Dec-17

Actual Score Dec 2017	No of cases Dec 2017
100%	20
N/A	
100%	
100%	
100%	
100%	
Annual	
Annual	
Annual	
Annual	
Annual	
Annual	
100%	12
N/A	N/A
90% FPF rate	289
87.50%	Results based on survey of members retiring between April and September 2017

Jan-18

Actual Score Jan 2018	No of Cases January 2018	Target	Trend	Comment
97%	29			1 case late
N/A			N/A	
100%				
100%				
100%				
100%				
Annual				
Annual			N/A	
Annual			N/A	
Annual			N/A	Issued April 2017
Annual			N/A	
Annual			N/A	Issued April 2017
100%	12			
0%	1			1 case late
90% FPF rate	508			
91.3%	Results based on survey of members retiring between October and December 2017			