

Westminster County Council - September 2018 Results on KPI Reporting



Description	Target time/date as per Partnership Agreement	Target	Actual Score for Quarter	Quantity June 2018	Actual Score June 2018	Comments	Quantity July 2018	Actual Score July 2018	Comments	Quantity August 2018	Actual Score August 2018	Comments	Quantity September 2018	Actual Score September 2018	Comments	Trend	People services Comments
Pension Administration																	
Death Benefits																	
Notify potential beneficiary of lump sum death grant	5 days	100%	%	0	N/A		0	N/A		0	N/A		0	N/A			nothing to measure.
Write to dependant and provide relevant claim form	5 days	100%	%	3	100%		2	100%		1	100%		5	100%		→	
Set up any dependants benefits and confirm payments due	14 days	100%	%	0	N/A		0	N/A		0	N/A		0	N/A		→	no cases in June and July.
Retirements																	
Retirement options issued to members	5 days	100%	%	1	100%		3	100%		6	100%		11	100%		→	
New retirement benefits processed for payment following receipt of all necessary documents	5 days	100%	%	1	100%		0	N/A		3	100%		8	100%		→	
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%	1	100%		0	N/A		3	100%		8	100%		→	
Refunds of Contributions																	
Refund paid following receipt of claim form	14 days	100%	%	5	100%		7	100%		8	100%		1	100%		→	
Deferred Benefits																	
Statements sent to member following receipt of leave notification	30 days	100%	%	10	100%		7	100%		13	100%		4	100%		→	
Notification to members 2 months before payments due																	
	2 months		%	50		Target is 2 months before due date but issued 6 weeks before in June	23		Target is 2 months before due date. All on time as processed 8-9 weeks before in July	24		Target is 2 months before due date. All on time as processed 8 weeks before in August	11		Target is 2 months before due date. Processed 6 weeks before in August	↑	Improvement that Surrey have made in sending out option forms for deferred benefits into payment within 2 months.
Lump Sum (on receipt of all necessary documentation)																	
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	5 days		%	13	100%		17	100%		11	100%		21	100%		→	
	Next available pay run		%	13	100%		17	100%		11	100%		21	100%		→	
New Joiners																	
New starters processed	30 days	100%	%	4	100%		0	N/A		0	N/A		2	100%		→	
Transfers In																	
Non LGPS transfers-in quotations	30 days	100%	%	3	100%		0	N/A		2	100%		3	100%		→	
Non LGPS transfers-in payments processed	30 days	100%	%	0	N/A		0	N/A		0	N/A		0	N/A		→	no cases in period.
Transfers Out																	
Non LGPS transfers-out quotations processed	30 days	100%	%	3	100%		4	100%		3	100%		3	100%		→	
Non LGPS transfers out payments processed	30 days	100%	%	1	100%		4	100%		2	100%		0	N/A		→	
Interfunds in - Quotations																	
Interfunds in - Quotations	30 days	100%	%	1	100%		2	100%		2	100%		3	100%		→	
Interfunds in - Actuals																	
Interfunds in - Actuals	30 days	100%	%	0	N/A		0	N/A		0	N/A		0	100%		→	
Interfunds Out - Quotations																	
Interfunds Out - Quotations	30 days	100%	%	7	100%		8	100%		3	100%		2	100%		→	
Interfunds Out - Actuals																	
Interfunds Out - Actuals	30 days	100%	%	7	100%		7	100%		8	100%		5	83%	1 case late	↓	1 case late but not delaying an immediate payment of benefit.
Estimates																	
1-10 cases	5 Days		%	6	100%		3	N/A		0	N/A		0	N/A		→	
11-50 cases	Agreed with WCC		%		N/A			N/A			N/A			N/A			no cases in period.
51 cases or over	Agreed with WCC		%		N/A			N/A			N/A			N/A			no cases in period.
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		%	15	100%		24	100%		38	100%		28	100%		→	
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				100%			100%			100%			100%		→	
Issue of monthly payslips	3 days before pay day				100%			100%			100%			100%		→	
RTI File submitted to HMRC	3 days before pay day				100%			100%			100%			100%		→	
BACS File submitted for payment	3 days before pay day				100%			100%			100%			100%		→	
P35	EOY					Date Achieved											
						31-Mar-18					31-Mar-18						31-Mar-18
Annual Exercises																	
Annual Benefit Statements Issued to Active members																	
	31 August each year				Annual			Annual	These are underway and due to be completed for deadline		Annual	Completed at 100% on time rate apart from exceptions		Annual			Note All data received by employers on time by 30th of April 2018 resulted in an individual getting an Annual Pension Statement by 31st of August 2018. One employer with 6 staff active on our system submitted a return late and the data submitted is not adequate to send out statements at this point. The employer is being chased to submit a suitable return.
Annual Benefit Statements Issued to Deferred members																	
	31 August each year				Annual			Annual	These are underway and due to be completed for deadline		Annual	Completed at 100%		Annual			
P35s Issued to Pensioners																	
Non LGPS transfers-in quotations processed within 20 days	31 May each year				100%	Issued April 2018		100%	Issued April 2018		100%	Issued April 2018		100%	Issued April 2018		
Apply Pensions Increase to Pensioners																	
Pensioners Newsletter	April each year				100%			100%			100%	Issued March 2018		100%	Issued March 2018		
Customer Service																	
Correspondence																	
Acknowledgement if more than 5 days	2 days																
Response	10 days			5	100%		10	100%		12	100%		18	94%	1 case late	↓	
3rd party enquiries	10 days			7	N/A	100%	3	N/A	100%	6	100%		8	100%		→	
Helpdesk Enquiries																	
Volumes of Enquiries Handled by Helpdesk	Number of Enquiries Handled			381		89% FPF rate	339		91% FPF rate	500		92% FPF Rate	507		93% FPF Rate		
Customer Surveys																	
Monthly survey to retirees	Percentage Satisfied with Service				86%			N/A	Sureys issued July 2018 - to be analysed 1 October 2018		N/A	Sureys issued July 2018 - to be analysed 1 October 2018		87.5%			