

## Westminster County Council - May 2021 to August

Description	Target time/date as per Partnership Agreement	Target
<b>Pension Administration</b>		
<p><b>Death Benefits</b> Notify potential beneficiary of lump sum death grant</p>	5 days	<b>100%</b>
Write to dependant and provide relevant claim form	5 days	<b>100%</b>
Set up any dependants benefits and confirm payments due	14 days	<b>100%</b>

<p><b>Retirements</b> Retirement options issued to members</p>	<p>5 days</p>	<p><b>100%</b></p>
<p>New retirement benefits processed for payment following receipt of all necessary documents</p>	<p>5 days</p>	<p><b>100%</b></p>
<p>Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation</p>	<p>Next available pay run</p>	

<p><b>Refunds of Contributions</b> Refund paid following receipt of claim form</p>	<p>14 days</p>	<p><b>100%</b></p>
<p><b>Deferred Benefits</b> Statements sent to member following receipt of leaver notification</p>	<p>30 days</p>	<p><b>100%</b></p>
<p><b>Notification to members 2 months before payments due</b></p>	<p>2 months</p>	

<b>Lump Sum ( on receipt of all necessary documentation)</b>	5 days	
<b>Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation</b>	Next available pay run	
<b>New Joiners</b> New starters processed	30 days	<b>100%</b>
<b>Transfers In</b> Non LGPS transfers-in quotations	30 days	<b>100%</b>
Non LGPS transfers-in payments processed	30 days	<b>100%</b>
<b>Transfers Out</b> Non LGPS transfers-out quotations processed	30 days	<b>100%</b>
Non LGPS transfers out payments processed	30 days	<b>100%</b>
Interfunds In - Quotations	30 days	<b>100%</b>
Interfunds In - Actuals	30 days	<b>100%</b>

Interfunds Out - Quotations	30 days	<b>100%</b>
Interfunds Out - Actuals	30 days	<b>100%</b>
<b>Estimates</b>		
<b>1-10 cases</b>	5 Days	
<b>11-50 cases</b>	Agreed with WCC	
<b>51 cases or over</b>	Agreed with WCC	
<b>Material Changes</b>		
<b>Any changes to data which materially affect actual or potential benefits to be processed within 30 days of receiving all necessary data</b>	30 days	
Members notified of terms of purchasing additional pension	15 days	
<b>Monthly Pensioner Payroll</b>		
Monthly Pensioner Payroll	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	
<b>P35</b>	EOY	

<b>Annual Exercises</b>		
<b>Annual Benefit Statements</b> Issued to Active members	31 August each year	
<b>Annual Benefit Statements</b> Issued to Deferred members	31 August each year	
<b>P60s Issued to Pensioners</b> Non LGPS transfers-in quotations processed within 20 days	31 May each year	
<b>Apply Pensions Increase to Pensioners</b>	April each year	
<b>Pensioners Newsletter</b>	April each year	
<b>Customer Service</b>		
<b>Correspondence</b>		
Response	10 days	
<b>Helpdesk Enquiries</b>		

# 2021 Results on KPI Reporting

Quantity May 2021	Actual Score May 2021	Quantity June 2021	Actual Score June 2021
15	100%	11	91%
9	33%	8	75%

12	67%	6	83%
4	100%	7	100%
4	100%	7	100%



6	100%	19	100%
3	100%	3	100%
16	100%	23	100%

27	100%	32	81%
27	100%	32	81%
98	100%	164	100%
1	100%	2	100%
3	100%	0	N/A
7	100%	2	100%
0	N/A	0	N/A
16	81%	11	82%
3	100%	5	100%

15	100%	16	94%
8	100%	8	88%
8	88%	13	92%
n/a	n/a	n/a	n/a
n/a	n/a	n/a	n/a
39	100%	21	90%
0	N/A	1	N/A
	100%		100%
	100%		100%
	100%		100%
	100%		100%
	31-Mar-21		31-Mar-21

	Annual		Annual
	Annual		Annual
	16	47	81%
		477	92%
			-

Comments	Quantity July 2021	Actual Score July 2021	Comments
1 case missed the SLA target	3	100%	
1 death grant case missed the SLA target this was due to delay in response to death correspondence to chasers sent by Lewes team, required additional authorisation given then time lapse from death of member. 1 survivor pension set up missed the SLA target by 8 days.	1	0%	Only 1 death grant, which missed the SLA target.

1 case missed the SLA target by 3 days	8	50%	4 missed the SLA target
	5	80%	1 missed the SLA target
	5	100%	

	28	96%	I missed the SAL target
	28	100%	
	27	100%	

6 cases missed the SLA target	13	31%	9 missed the SLA target
	13	31%	

164 starters processed	176	100%	176 starters processed
	4	100%	
	4	100%	
	2	50%	1 missed the SLA target
	0	N/A	
2 cases missed SLA target.	12	75%	3 missed the SLA target
	5	100%	



1 case missed SLA target.	9	100%	
1 case missed SLA target.	8	88%	1 missed the SLA target
1 case missed SLA target.	1	0%	Only 1 estimate, which missed the SLA target.
	n/a	n/a	
	n/a	n/a	
2 cases missed SLA target.	9	100%	
The case missed the SLA target - it was a historic case dating back to 2016 and clarification required that member had purchased additional pension in the correct financial year.	0	N/A	
		100%	
		100%	
		100%	
		100%	
		31-Mar-21	

		Annual	2,572 active statements produced by 31st July 2021.
		Annual	
Issued April 2021			Issued April 2021
Pension Increase applied for 21/22			Pension Increase applied for 21/22
Pensioner newsletter sent in April 2021			Pensioner newsletter sent in April 2021
9 cases missed the SLA target.	35	91%	3 cases missed the SLA target.
92% of calls in June 2021 were dealt with at first point of contact	413	92%	92% of calls in July 2021 were dealt with at first point of contact

Quantity August 2021	Actual Score August 2021	Comments	Comments
12	83%	2 cases missed the SLA target	
0	100%	No dependent benefits this month.	

11	9%	10 cases missed the SLA target	
2	0%	Both missed the SAL target	
2	100%		



27	96%	1 missed the SLA target	
9	78%	2 missed the SLA target	
31	93%	2 missed the SLA target	




17	6%	16 missed the SLA target	
17	6%		
57	100%	57 starters processed	
0	N/A		
1	0%	1 missed the SLA target	
2	100%		
1	0%	1 missed the SLA target	
9	67%	3 missed the SAL target	3 cases missed SLA target
2	50%	1 missed the SLA target	




6	83%	1 missed the SLA target	
3	100%		
1	0%	Only 1 estimate, which missed the SLA target.	1 case missed SLA target.
n/a	n/a		
n/a	n/a		
11	72%	3 missed the SLA target	
0	N/A		
	100%		
	100%		
	100%		
	100%		
	31-Mar-21		










	Annual	4,068 active statements produced by 31st Aug 2021.	
	Annual		
		Issued April 2021	
		Pension Increase applied for 21/22	
		Pensioner newsletter sent in April 2021	
20	75%	5 cases missed the SLA target	
479	91%	91% of calls in August 2021 were dealt with at first point of contact	





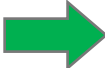
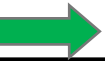




Trend	People services Comments
	This KPI was on track until August when 2 cases missed target out of 12.
	Poor performance across the reporting months of May, June and July which followed previous poor performance.

	<p>Again poor performance across the months of May, June, July and August. August is particularly dissapoininting with 10 out of 11 cases processed outside of the KPI target of 5 days.</p>
	<p>July and August are again poor.</p>
	<p>As above KPI are poor, it's pleasing to note that members were at least added to the next available pension payroll in line with KPI requirements. This maybe why despite slow response documented above no complaints have been received to the strategic pension lead.</p>

	<p>Though I am pleased to note the relatively positive KPI for refunds in June, July and August I believe there will be at least one late case for September.</p>
	<p>Dissapointing in August.</p>
	<p>Again August was dissapointing though in this case only 2 out of 31 cases were processed outside of KPI.</p>

	<p>Unfortunately this KPI was poor in all three months and worryingly getting worse as we move closer to the contract termination.</p>
	<p>As in the case of the KPI above this one is poor again in all three months June, July and August and worryingly getting worse the closer we get to exit.</p>
	<p>This KPI is ok</p>
	
	<p>August again poor.</p>
	<p>I case late in July.</p>
	
	<p>All months in the KPI period were dissappointing.</p>
	<p>Poor in August</p>

	Poor in August
	Poor in June and July
	Surrey have been very late in sending through estimates for employer redundancy cases in particular.
	
	We are pleased this remains 100%.
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