

MONTHLY RESULTS FOR DECEMBER, JANUARY, FEBRUARY AND MARCH BASED ON NEW KPI REPORTING

Description	Target time/date as per Partnership Agreement	No of Cases December	Actual Score Dec	No of Cases January	Actual Score Jan	Comments
<b>PENSION ADMINISTRATION</b>						
<b>DEATH BENEFITS</b>						
Notify potential beneficiary of lump sum death grant	5 days	NA	N/A	NA	N/A	
Write to dependant and provide relevant claim form	5 days	1	100%	1	100%	
Set up any dependants benefits and confirm payments due	14 days	5	60%	2	50%	3 cases late in total but paid on next available payroll run
<b>RETIREMENTS</b>						
Retirement options issued to members	5 days	2	50%	10	80%	3 late cases but we have increased resourcing in this area from February 2017 to avoid any future delays
New retirement benefits processed for payment following receipt of all necessary documents	5 days	7	72%	3	100%	2 cases late in Dec
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run	7	100%	3	100%	
<b>REFUNDS OF CONTRIBUTIONS</b>						
Refund paid following receipt of claim form	14 days	4	100%	9	100%	
<b>DEFERRED BENEFITS</b>						
Statements sent to member following receipt of leaver notification	30 days	9	89%	7	71%	Volumes expected to increase once leaver forms received from BT and from other scheme employers
<b>DEFERRED PAYMENTS</b>						
Notification to members 3 months before payments due	3 months	8	Average 2 weeks in advance	11	Average 2 weeks in advance	Work process amended from February 2017
Lump Sum (on receipt of all necessary documentation)	5 days	8	50%	10	50%	We have increased resourcing in this retirement area from February 2017 to avoid any future delays
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run	8	100%	10	100%	
<b>NEW JOINERS</b>						
New starters processed	30 days	20	100%	1	100%	Awaiting interface from BT so numbers only show records created manually
<b>TRANSFERS IN</b>						
Non LGPS transfers-in quotations	30 days	2	100%	16	100%	All Quotations issued within statutory timescales. Agreement at meeting between SCC and WCC in Feb 2017 that future reports will identify LGPS transfers as additional measure.
Non LGPS transfers-in payments processed	30 days	NA		NA		
Non LGPS transfers-out quotations processed	30 days	7	86%	20	70%	
Non LGPS transfers out payments processed	30 days	2	100%	4	100%	
Interfunds In - Quotations	30 days					
Interfunds In - Actuals	30 days					
Interfunds Out - Quotations	30 days					
Interfunds Out - Actuals	30 days					
<b>ESTIMATES</b>						
1-10 cases	5 Days	9	89%	5	60%	2 cases late in January
11-50 cases	Agreed with WCC	NA	NA	NA	NA	
51 cases or over	Agreed with WCC	80 plus	100%	See Dec entry	See Dec entry	Large exercise carried out on behalf of WCC in Dec and Jan
<b>MATERIAL CHANGES</b>						
Any changes to data which materially affect actual or potential benefits to be processed within 30 days of receiving all necessary data	30 days	44	100%	221	100%	Includes Change of Bank account, address, expression of wish. Large number of bulk bank changes in January.
<b>BUYING ADDITIONAL PENSIONS</b>						
Members notified of terms of purchasing additional pension	15 days	0	100%	1	100%	
<b>Monthly Pensioner Payroll</b>						
Full reconciliation of payroll and ledger report provided to WCC	Last day of month		100%		100%	
Issue of monthly payslips	3 days before pay day		100%		100%	
RTI file submitted to HMRC	3 days before pay day		100%		100%	
BACS File submitted for payment	3 days before pay day		100%		100%	
P35	EOY		Annual		Annual	
<b>Annual Exercises</b>						
ANNUAL BENEFIT STATEMENTS Issued to Active members	31 August each year		Annual		Annual	
ANNUAL BENEFIT STATEMENTS Issued to Deferred members	31 August each year		Annual		Annual	
P60s Issued to Pensioners	31 May each year		Annual		Annual	
Apply Pensions Increase to Pensioners	April each year		Annual		Annual	
Pensioners Newsletter	April each year		Annual		Annual	
<b>CUSTOMER SERVICE</b>						
<b>CORRESPONDENCE</b>						
Acknowledgement if more than 5 days	2 days					
Response	10 days	18	89%	28	75%	
3rd party enquiries	10 days	Nil		Nil		
<b>Helpdesk Enquiries</b>						
Volumes of Enquiries Handled By Helpdesk	Number of Enquiries Handled	432	79% FPF	561	83% FPF	FPF means enquiries resolved as 'First Point Fix' by Helpdesk team that did not require referral to Operations team
<b>Customer Surveys</b>						
Monthly survey to retirees	Percentage Satisfied with Service		Quarterly		Quarterly	Due After End of March

FEBRUARY AND MARCH REPORTING

No of Cases Feb and Mar	Actual Score Feb and March	Trend from January	Comments
2	100%	NA	
6	100%	NA	
8	100%		
49	89%		Large increase in volume of cases processed. 5 cases late
27	96%		Large increase in volume of cases processed. 1 case late
27	100%		
12	100%		
26	85%		Volumes expected to increase once leaver forms received from BT and from other scheme employers. 4 cases late.
89	New cases 2 months in advance.		Large increase in volume of cases processed following review. New cases now up to 2 months in advance.
26	96%		1 case late.
26	100%		
NA	NA	NA	Awaiting interface from BT so numbers only show records created manually
8	100%		
NA	NA	NA	
30	86%		4 cases late
NA	NA	NA	
9	100%	NA	New measure.
2	100%	NA	New measure.
21	86%	NA	New measure. 3 cases late
8	100%	NA	New measure.
6	83%		1 case late
NA	NA	NA	
141	100%		
NA	NA	NA	
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
NA	100%		
67	76%		
NA	NA	NA	
1347	82% FPF rate.		82% FPF rate.
<b>Pending report</b>			