

MONTHLY RESULTS FOR DECEMBER AND JANUARY BASED ON NEW KPI REPORTING

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
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	

JUNE TO AUGUST REPORTING

Actual Score June to August	No of Cases June to August	Comments
	0	
100%	5	
100%	2	
92%	26	
97%	34	
100%	34	
100%	21	
100%	30	
New cases 2 months in advance.	61	
100%	44	
100%	44	
100%	184	Monthly interfaces now being provided by BT
	7	Clearing last of backlog cases
100%	3	
100%	5	Plus 19 backlog cases cleared.
100%	2	
100%	4	
NA	0	
100%	9	
100%	3	
100%	12	
NA		
NA		
95%	198	

SEPTEMBER TO NOVEMBER REPORTING

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	
100%	137	

Actual Score Dec 2017	No of cases Dec 2017	Target	Trend	Comment
100%	1	100%		
100%	4	100%		
NA	0	100%		
100%	7	100%		
100%	3	100%		
100%	3	100%		Fall in September to November back 100% in December though overall numbers low.
100%	1	100%		
86%	7	100%		only 1 case late in December.
100%	18	2 months before		Note we have agreed that Surrey can write to members 2 months before benefits due not 3 months effective in December.
100%	10			fell 97% September - November but back to 100% December.
100%	10	100%		
100%	5	100%		
0	1			Please note that Transfer in KPI have been Temporarily suspended pending backlog clearance as a result of suspended CETV Factors.
NA	0	100%		
100%	5	100%		
100%	1	100%		
100%	1	100%		
NA	0	100%		
100%	6	100%		dropto 96% in Sept - Nov but back to 100% in December.
100%	6			
NA	0			
N/A			NA	
N/A			NA	
100%	20			

MONTHLY RESULTS FOR DECEMBER AND JANUARY BASED ON NEW KPI REPORTING

Description	Target time/date as per Partnership Agreement
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	EOY
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

JUNE TO AUGUST REPORTING

Actual Score June to August	No of Cases June to August	Comments
NA	NA	
100%		
100%		
100%		
100%		
31-Mar-17		
Annual		Issued by 31/8 target
Annual		Issued 1 week late
100%		Issued April 2017
100%		
100%		Issued April 2017
100%	21	
NA	NA	
	1369	88% FPF rate.

SEPTEMBER TO NOVEMBER REPORTING

Actual Score September to November 17	No of Cases September to November	Comments
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

Actual Score Dec 2017
N/A
100%
100%
100%
100%
Annual
Annual
Annual
Annual
Annual
Annual
100%
N/A
90% FPF rate
87.50%

No of cases Dec 2017

12
N/A

289

Target	Trend	Comment
	N/A	
	N/A	
	N/A	
	N/A	Issued April 2017
	N/A	
	N/A	Issued April 2017
	N/A	
	N/A	Results based on survey of members retiring between April and September 2017