









Westminster City Council - Jan 2020 Results on KPI Reporting

Description	Target time/date as per Partnership Agreement	Target	Actual Score for Quarter	Quantity December 2019	Actual Score December 2019	Quantity January 2020	Actual Score January 2020	Comments	Trend	People services Comments
Pension Administration										
Death Benefits										
Notify potential beneficiary of lump sum death grant	5 days	100%	%	1	100%	0	100%	x		
Write to dependant and provide relevant claim form	5 days	100%	%	4	100%	5	100%	x		
Set up any dependants benefits and confirm payments due	14 days	100%	%	1	100%	2	100%	x		
Retirements										
Retirement options issued to members	5 days	100%	%	3	100%	6	83%	1 CASE FAILED, by 2 days		1 case late in January
New retirement benefits processed for payment following receipt of all necessary documents	5 days	100%	%	7	100%	7	100%	x		
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%	7	100%	7	100%	x		
Refunds of Contributions										
Refund paid following receipt of claim form	14 days	100%	%	28	100%	12	100%	x		
Deferred Benefits										
Statements sent to member following receipt of leaver notification	30 days	100%	%	54	100%	74	100%	38 OF THESE CASES ARE BACKLOG		

Notification to members 2 months before payments due	2 months		%	34	0%	38	0%	1 CASE FAILED, by 2 days on the month timescale. All late for two months.		Please note that Orbis are looking at the introduction of new Robot technology to automate some aspects of our pension admin including sending letters to preserved benefit cases where pension is due to be paid. This has slowed down the sending of letters in December and January to one month before payment is due from our target two. We will work towards moving back to two months. Although we do not want this KPI to slip we are keen to ensure that tecnology is embrased where there is a future benefit.
Lump Sum (on receipt of all necessary documentation)	5 days		%	11	100%	19	100%	x		
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%	11	100%	19	100%	x		
New Joiners										
New starters processed	30 days	100%	%	5	100%	38	100%	38 MANUAL SET UP		
Transfers In										
Non LGPS transfers-in quotations	30 days	100%	%	3	100%	7	100%	x		
Non LGPS transfers-in payments processed	30 days	100%	%	10	100%	7	100%			
Transfers Out										
Non LGPS transfers-out quotations processed	30 days	100%	%	1	100%	6	100%	X		
Non LGPS transfers out payments processed	30 days	100%	%	0	100%	1	100%	X		
Interfunds In - Quotations	30 days	100%	%	3	100%	4	100%	X		
Interfunds In - Actuals	30 days	100%	%	1	100%	1	100%	x		All 100%
Interfunds Out - Quotations	30 days	100%	%	9	89%	10	100%	x		
Interfunds Out - Actuals	30 days	100%	%	12	100%	13	100%	X		All 100%
Estimates										
1-10 cases	5 Days		%	1	100%	7	100%			All 100%

11-50 cases	Agreed with WCC		%							
51 cases or over	Agreed with WCC		%							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		%	66	98%	130	100%			
Buying Additional Pensions										
Members notified of terms of purchasing additional pension	15 days		%	0	N/A	1	100%	X		
Monthly Pensioner Payroll										
Full reconciliation of payroll and ledger report provided to WCC	Last day of month				100%		100%			All 100%
Issue of monthly payslips	3 days before pay day				100%		100%			All 100%
RTI file submitted to HMRC	3 days before pay day				100%		100%			All 100%
BACS File submitted for payment	3 days before pay day				100%		100%			All 100%
P35	EOY				31-Mar-19		31-Mar-19			
Annual Exercises										
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 Non LGPS transfers-in quotations processed within 20 days	31 May each year				100%		100%	Issued April 2019		April 19 Actions completed.
Apply Pensions Increase to Pensioners	April each year				100%		100%			April 19 Actions completed.
Pensioners Newsletter	April each year				100%		100%			April 19 Actions completed.
								Issued April 2019		

