









Westminster County Council - April 2020 to Feb 2021 Results on KPI Reporting

Description	Target time/date as per Partnership Agreement	Target	Actual Score for Quarter	Quantity February 2021	Actual Score February 2021	Quantity March 2021	Actual Score March 2021	Quantity April 2021	Actual Score April 2021	Comments	Trend	People services Comments
Pension Administration												
Death Benefits Notify potential beneficiary of lump sum death grant	5 days	100%	%	1	100%	13	100%	13	100%			In March 2021 the two death KPI were combined into one as a result of an administration move. KPI for death cases appears to be on track.
Write to dependant and provide relevant claim form	5 days	100%	%	7	100%							We are pleased that everything remains within KPI.
Set up any dependants benefits and confirm payments due	14 days	100%	%	2	100%	5	100%	8	63%	3 cases exceeded the SLA target, one by 28 days, one by 16 days and the other by 5 days. (28 days - forms returned on 25 Feb and due to be complete on 5 March prior to migration to Surrey team, case completed on 19 April. 16 days over - forms received 4 March, calcs completed on 19 April)(5 days - complicated case where pension hadnt been claimed back to 2009)		We are disappointed by the three late cases in April. The transfer of the admin service from East Sussex to Kingston appears to have impacted this. Additionally I was aware of the complicated death case and we do need to ensure that this one is checked carefully before payment released.

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Retirements Retirement options issued to members	5 days	100%	%	4	100%	4	75%	7	57%	4 cases missed the SLA target. 2 cases missed the target by 1 day and another case missed the target by 2 days. The 4th case exceeded the SLA target by 9 days.		Slippage in retirement processing is a concern in both March and April 2021. Most cases the delay appears to be minimal.
New retirement benefits processed for payment following receipt of all necessary documents	5 days	100%	%	12	100%	10	100%	4	100%	1 case was a tier 1 ill health retirement completed.		We are pleased that payment of retirement benefits appears to be within KPI.
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%	12	100%	10	100%	4	100%			Overall we are pleased that the vast majority of these cases were processed on time.

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Refunds of Contributions Refund paid following receipt of claim form	14 days	100%	%	11	100%	18	100%	6	100%			Refunds is another identified priority in the COVID Pandemic. We are pleased that this KPI remains 100%. The fund does have a number of frozen refunds that will need reviewing in due course.
Deferred Benefits Statements sent to member following receipt of leaver notification	30 days	100%	%	30	100%	10	100%	4	50%	2 cases missed the SLA target. Both cases were deferred in 2019 by Surrey and migrated to East Sussex, however neither were checked during this period and only checked & workflow completed upon return to Surry admin. The members did receive an annual statement during this period because the statement is issued once the status changes to deferred.		On a positive note at least Surrey identified that the workflow in these two cases has not been completed all be it 2 years later. The majority of cases are processed in a timely manner.

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Notification to members 2 months before payments due	2 months		%	45	100%	28	100%	43	98%	1 case exceeded the SLA target. Was picked up in diary report to complete a retirement quote age 60 (not requested by member), NRA = 65. No response from member to take benefits early.		Overall we are pleased that the vast majority of these cases were processed on time.
Lump Sum (on receipt of all necessary documentation)	5 days		%	11	82%	20	75%	18	94%	1 case exceeded the SLA target by 1 day. Forms received on 1 Feb 2021, no case was created. Retirement date 16 March not put into payment before migration to Surrey team.		We are dissapointed by this KPI and note that most months we seem to gert some failures to meet the deadline although in April the KPI was improved from the prior months. Overall consider this a negative trend.
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run		%	11	100%	20	100%	18	94%	See note above.		We had seen an improvement in this KPI in the last few months. The late processing of one case is a disappointment.
New Joiners												
New starters processed	30 days	100%	%	2	100%	70	100%		32	100%		

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Transfers In												
Non LGPS transfers-in quotations	30 days	100%	%	4	100%	3	100%		4	100%		
Non LGPS transfers-in payments processed	30 days	100%	%	1	100%	0	N/A		1	100%		
Transfers Out												
Non LGPS transfers-out quotations processed	30 days	100%	%	17	100%	7	85%		2	100%		March KPI data dissapointing. Hopefully with admin transfer from East Sussex complete this will not reoccur.
Non LGPS transfers out payments processed	30 days	100%	%	1	100%	1	100%		0	N/A		
Interfunds In - Quotations	30 days	100%	%	4	100%	3	100%		6	100%		
Interfunds In - Actuals	30 days	100%	%	2	100%	3	67%		1	100%		March KPI data dissapointing
Interfunds Out - Quotations	30 days	100%	%	5	100%	17	76%		15	100%		March KPI data dissapointing
Interfunds Out - Actuals	30 days	100%	%	7	100%	16	88%		4	100%		March KPI data dissapointing
Estimates												
1-10 cases	5 Days		%	5	100%	1	100%		6	83%		1 case exceeded the SLA target by 1 day. This case was within a batch of 6 case requests for efficiency estimates, it is not clear why 1 was not completed within 5 days, other 5 on the request exceeded target.
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		%	130	100%	18	100%		10	100%		We are pleased this remains 100%.
Members notified of terms of purchasing additional pension	15 days		%	1	100%	1	100%		0	N/A		
Monthly Pensioner Payroll												
Monthly Pensioner Payroll	Last day of month				100%		100%			100%		We are pleased this remains 100%.
Issue of monthly payslips	3 days before pay day				100%		100%			100%		We are pleased this remains 100%.

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RTI file submitted to HMRC	3 days before pay day				100%		100%			100%		We are pleased this remains 100%.
BACS File submitted for payment P35	3 days before pay day				100%		100%			100%		We are pleased this remains 100%.
	EOY				31-Mar-20		31-Mar-20			31-Mar-21		
Annual Exercises			Date Achieved									
Annual Benefit Statements Issued to Active members	31 August each year				Annual		Annual			Annual		
Annual Benefit Statements Issued to Deferred members	31 August each year				Annual		Annual			Annual		
P60s Issued to Pensioners Non LGPS transfers-in quotations processed within 20 days	31 May each year				100%		100%					Issued April 2021
Apply Pensions Increase to Pensioners	April each year				100%		100%			100%		Pension Increase applied for 21/22
Pensioners Newsletter	April each year				100%		100%					Pensioner newsletter sent in April 2021
Customer Service Correspondence												
Response Helpdesk Enquiries	10 days			18	100%	26	77%		16	100%		issue in March 2021
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