

## Westminster County Council - March 2021 to May 2021

Description	Target time/date as per Partnership Agreement	Target	Quantity March 2021
<b>Pension Administration</b>			
<p><b>Death Benefits</b> Notify potential beneficiary of lump sum death grant</p>	5 days	<b>100%</b>	13
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>	5

<p><b>Retirements</b> Retirement options issued to members</p>	5 days	<b>100%</b>	4
<p>New retirement benefits processed for payment following receipt of all necessary documents</p>	5 days	<b>100%</b>	10
<p>Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation</p>	Next available pay run		10

<p><b>Refunds of Contributions</b> Refund paid following receipt of claim form</p>	14 days	<b>100%</b>	18
<p><b>Deferred Benefits</b> Statements sent to member following receipt of leaver notification</p>	30 days	<b>100%</b>	10
<p><b>Notification to members 2 months before payments due</b></p>	2 months		28

<b>Lump Sum ( on receipt of all necessary documentation)</b>	5 days		20
<b>Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation</b>	Next available pay run		20
<b>New Joiners</b> New starters processed	30 days	<b>100%</b>	70
<b>Transfers In</b> Non LGPS transfers-in quotations	30 days	<b>100%</b>	3
Non LGPS transfers-in payments processed	30 days	<b>100%</b>	0
<b>Transfers Out</b> Non LGPS transfers-out quotations processed	30 days	<b>100%</b>	7
Non LGPS transfers out payments processed	30 days	<b>100%</b>	1
Interfunds In - Quotations	30 days	<b>100%</b>	3

Interfunds In - Actuals	30 days	<b>100%</b>	3
Interfunds Out - Quotations	30 days	<b>100%</b>	17
Interfunds Out - Actuals	30 days	<b>100%</b>	16
<b>Estimates</b>			
<b>1-10 cases</b>	5 Days		1
<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		18
Members notified of terms of purchasing additional pension	15 days		1
<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 Correspondence</b>			
Response	10 days		26
<b>Helpdesk Enquiries</b>			

## Results on KPI Reporting

Actual Score March 2021	Quantity April 2021	Actual Score April 2021	Quantity May 2021	Actual Score May 2021
100%	13	100%	15	100%
100%	8	63%	9	33%

75%	7	57%	12	67%
100%	4	100%	4	100%
100%	4	100%	4	100%









100%	6	100%	6	100%
100%	4	50%	3	100%
100%	43	98%	16	100%



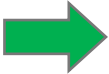
75%	18	94%	27	100%
100%	18	94%	27	100%
100%		32	98	100%
100%		4	1	100%
N/A		1	3	100%
85%		2	7	100%
100%		0	0	N/A
100%		6	16	81%






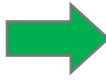

67%		1	3	100%
76%		15	15	100%
88%		4	8	100%
100%		6	8	88%
			n/a	n/a
			n/a	n/a
100%		10	39	100%
100%		0	0	N/A
100%				100%
100%				100%
100%				100%
100%				100%
31-Mar-20				31-Mar-21
Annual				Annual

Annual				Annual
100%				
100%				
100%				
77%		16		16
-				










Comments			Comments			Trend		
								
								
								





		
	1 case was a tier 1 ill health retirement completed.	
		

		
		
	100%	
	100%	
	100%	
	100%	
	N/A	
3 cases missed SLA target	100%	



	100%	
	100%	
	100%	
1 case missed SLA target.	83%	
	100%	
	N/A	
	100%	
	100%	
	100%	
	100%	
	100%	
	Annual	

	Annual	
		
	100%	
		
100%	100%	

## People services Comments

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.

We are pleased that everything remains within KPI.

We are disappointed by the late cases in April and in May. 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. May KPI rate includes some legacy cases picked up from East Sussex that were not picked up

Slippage in retirement processing is a concern in both March and April and May2021. Most cases the delay appears to be minimal in that the case is missing KPI by one or two days.

We are pleased that payment of retirement benefits appears to be within KPI.

Overall we are pleased that the vast majority of these cases were processed on time.

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.

Surrey identified two cases that had not been completed on time by East Sussex those cases have now been completed in April and the KPI then improved in May.

Overall we are pleased that the vast majority of these cases were processed on time. One case was late in April.

We are dissapointed by this KPI in March and April 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. We are pleased that this was 100% IN May and hope it continues through until the end of October.

We had seen an improvement in this KPI in the last few months. The late processing of one case in April is a dissapointment.

March KPI data dissapointing but we have seen improvement in April and May. Hopefully with admin transfer from East Sussex complete this will not reoccur.

March KPI data dissappointing

March KPI data dissappointing

March KPI data dissappointing

There are more estimate requests starting to come through and our priority remains KPI related directly to member payments but the delay in some cases is dissappointing. Overall we have not noticed an impact

We are pleased this remains 100%.

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We are pleased this remains 100%.

5,517 statements produced.  
1,294 statements not produced (1,293 suppressed as record marked as gone away).  
1 error on record that will not allow statement to be produced and will need to be corrected. Electronic tracing results received back to date interfaced prior to statements produced. Reduction of 590 gone away records following address tracing exercise compared to 19.20 (1,883 suppressed as record marked as gone away).

Issued April 2021

Pension Increase applied for 21/22

Pensioner newsletter sent in April 2021

issue in March 2021