

London Borough of Enfield Pension Fund – Administration – Key Performance Indicators (TPR) – Quarter 3 – 1st October 2020 to 31st December 2020

QUARTER 3 - 1/10/2020 TO 31/12/2020			
Process	No. of cases commenced in quarter	No. of cases completed in quarter	No. cases outstanding at quarter end
Deaths – initial letter acknowledging death of members	99	29	108
Retirements – letter notifying estimate retirement benefits	25	153	15
Retirements – letter notifying actual retirement benefits	50	91	46
Deferment – calculate and notify deferred benefits	114	172	111
Transfers in/out – letter detailing transfer quote	79	112	44
Refund – Process & pay a refund	12	13	13
Divorce quote – letter detailing cash equivalent value and other benefits	5	7	5
Divorce settlement – letter detailing implementation of pension sharing order	7	0	7
Joiners – notification of date of enrolment - manual set up	1	63	0
Joiners – notification of date of enrolment - iconnect	0	0	0
Key Performance Indicators			
Process	KPI	Good Practice Requirement	%
Deaths – letter notifying amount of dependants pension	29	2 Months	75.86%
Retirements – letter notifying estimate of retirement benefits	153	2 Months	98.04%
Retirements – letter notifying actual retirement benefits	91	2 Month	92.31%
Transfers in/out - letter detailing transfer quote	112	2 Months	89.29%
Refund – process and pay a refund	13	2 Months	92.31%
Divorce quote - letter detailing cash equivalent value and other benefits	7	2 months	100.00%
Divorce settlements – letter detailing implementation of pension sharing	0	3 Months	n/a
Joiners – notifications of date of enrolment	63	2 Months	98.41%

ALL OTHER REPORTING AREA's not covered by TPR KPI requirement

Process	No. of cases commenced in quarter	No. of cases completed in quarter	No. cases outstanding at quarter end
ABS – Communication responding to members query	5	6	5
50/50 - form processed	0	9	0
Additional Service quotes	3	2	3
Opt Outs - request processed	3	98	1
Additional Pension Contribution (APC) - Request processed	2	2	1
Additional Voluntary Contribution (AVC) - Request processed	8	15	9
General Altair System Amendments (address / nomination etc)	23	216	6
Miscellaneous	141	1191	246
Guaranteed Minimum Pension (GMP) notifications	134	76	124
Leaver (- 2 years + 14 service)	61	83	40
Leaver (- 2 years - 14 service)	0	1	0
Frozen Refund Calculations	1	85	11
Deferred	114	172	111
Amalgamation (internal transfers)	364	83	281
Transfer In Authorisation form	2	23	0
Transfer In - IFA Estimate	25	29	8
Transfer In - IFA Actual	15	16	12
Transfer In - Non LGPS - Estimate	15	4	11
Transfer In - Non LGPS - Actual	10	8	6
Transfer Out - IFA Estimate	14	48	12
Transfer Out - IFA Actual	14	24	14
Transfer Out - Non LGPS - Estimate	25	31	13
Transfer Out - Non LGPS - Actual	6	2	5
Annual Allowance (one off yearly project)	4	0	5
	989		

Key Performance Indicators			
Process	KPI	Good Practice Requirement	%
ABS – Communication responding to members query	6	2 Months	100.00%
50/50 - form processed	9	10 working days	88.88%
Opt Outs - request processed	98	10 working days	99%
Additional Service quotes	2	2 Months	100%
Additional Pension Contribution (APC) - Request processed	2	2 Months	100%
Additional Voluntary Contribution (AVC) - Request processed	15	2 Months	100%
General Altair System Amendments (address / nomination etc)	216	10 working days	93%
Miscellaneous	1191	2 Months	99.16%
Guaranteed Minimum Pension (GMP) notifications	76	2 Months	100%
Leaver (- 2 years + 14 service)	83	2 Months	94%
Leaver (- 2 years - 14 service)	1	2 Months	100%
Frozen Refund Calculations	85	2 Months	100%
Deferred	172	2 Months	93.61%
Amalgamation (internal transfers)	83	2 Months	90%
Transfer In Authorisation form	23	10 working days	91.30%
Transfer In - IFA Estimate	29	2 Months	62.01%
Transfer In - IFA Actual	16	2 Months	87.50%
Transfer In - Non LGPS - Estimate	4	2 Months	75%
Transfer In - Non LGPS - Actual	8	2 Months	62.50%
Transfer Out - IFA Estimate	48	2 Months	100%
Transfer Out - IFA Actual	24	2 Months	87.50%
Transfer Out - Non LGPS - Estimate	31	2 Months	100%
Transfer Out - Non LGPS - Actual	2	2 Months	100%
Annual Allowance (one off yearly project)	0	2 Months	n/a
	2224		