

## Key Performance Indicators – Quarter 1 – 1/4/21 to 30/06/2021

### 5. Pension Administration Key Performance and Statistics - Quarterly

#### Key Performance Indicators

A number of performance indicators are presented below to ensure that service to members of the pension fund is effective.

#### QUARTER 1 - 1/4/2021 TO 30/06/2021

Key Performance Indicators			
Process	KPI	Good Practice Requirement	%
Deaths – letter notifying amount of dependants pension	48	2 Months	72.92%
Retirements – letter notifying estimate of retirement benefits	126	2 Months	95.24%
Retirements – letter notifying actual retirement benefits	99	2 Month	71.72%
Transfers in/out - letter detailing transfer quote	102	2 Months	82.01%
Refund – process and pay a refund	25	2 Months	100.00%
Divorce quote - letter detailing cash equivalent value and other benefits	9	2 months	33.33%
Divorce settlements – letter detailing implementation of pension sharing	1	2 Months	0%
Joiners – iconnect starters	203	2 Months	100.00%
Joiners – manual set up starters - non iconnect starters	90	2 Months	100.00%

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

Key Performance Indicators			
Process	KPI	Good Practice Requirement	%
ABS – Communication responding to members query	43	2 Months	100%
50/50 - form processed	4	10 working days	100%
Opt Outs - request processed	49	10 working days	97.96%
Additional Service quotes	7	2 Months	100%
Additional Pension Contribution ( APC) - Request processed	2	2 Months	50%
Additional Voluntary Contribution (AVC) - Request processed	13	2 Months	92.31%
General Altair System Amendments ( address / nomination etc)	434	10 working days	99.31%
Miscellaneous	1954	2 Months	98.96%
Guaranteed Minimum Pension (GMP) notifications	70	2 Months	100%
Leaver ( - 2 years + 14 service)	67	2 Months	97.02%
Leaver ( - 2 years - 14 service)	0	2 Months	0
Frozen Refund Calculations	43	2 Months	95.35%
Deferred	115	2 Months	82.61%
Amalgamation (internal transfers)	0	2 Months	0
Transfer In Authorisation form	19	10 working days	100%
Transfer In - IFA Estimate	42	2 Months	85.71%
Transfer In - IFA Actual	13	2 Months	46.15%
Transfer In - Non LGPS - Estimate	9	2 Months	55.56%
Transfer In - Non LGPS - Actual	4	2 Months	25%
Transfer Out - IFA Estimate	31	2 Months	96.77
Transfer Out - IFA Actual	23	2 Months	95.65%
Transfer Out - Non LGPS - Estimate	20	2 Months	90%
Transfer Out - Non LGPS - Actual	0	2 Months	0

**Total workflows completed 3,361 in time 3,125**

**Total % completion rate 92.98%**



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