

Caseload Performance – Local Government Pension Scheme

Detail of KPI	Target %	Mar 17	Apr 17	May 17	Jun 17	July 17	Aug 17	Sep 17	Oct 17	Nov 17	Dec 17	Jan 18	Feb 18	Mar 18	Apr 18	May 18
Benefits Payments - Payments made to new pensioners within 10 working days of receipt of all information	97.00	96.6% 144/149	81.5% 110/135	81.0% 124/153	86.8% 132/152	95.4% 125/131	96.3% 26/27	87.3% 84/96	97.2% 70/72	89.5% 51/57	85.8% 145/169	100% 56/56	98.77% 160/162	99.23% 129/130	88.11% 252/286	64.20% 122/190
Retirement Estimates - Estimates provided within 10 working days of receipt of all information	97.50	63.6% 168/264	61.9% 109/176	64.5% 151/234	66.7% 156/234	58% 119/205	82.7% 67/81	66.2% 102/154	58.9% 66/112	72.8% 118/162	70.7% 94/133	98.57% 103/105	92.78% 167/180	90.21% 212/235	76.27% 241/316	61.20% 60/80
Deferred Benefits Statements to deferred (members leaving eligible employment) 20 working days	97.5	39.3% 35/89	14.0% 48/342	9.9% 14/141	17.8% 32/180	60.7% 37/61	83.3% 5/6	50.0% 38/76	34.4% 43/125	22.7% 70/309	91% 364/400	100% 27/27	91.44% 171/187	91.10% 297/326	84.07% 322/383	83.10% 207/249

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Reworking by Actuary Rejection by the actuary for higher than 1% inaccuracy (reported annually)	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	NA	NA	NA	NA	NA

Definition of KPIs

Benefit Payment

% of pension benefits, retirement benefits and death benefits paid accurately and in line with payment timelines, following appropriate authorisation.

1. Retirement Benefits – Lump Sum to be paid within 10 working days of receipt of all necessary paperwork to be able to make payment
2. Retirement Pension – To be sent to pensioner payroll for the next available pensioner payroll run

Retirement Estimates

Estimate to be provided within 10 working days of receipt of all necessary information required to produce estimate - % calculated accurately and within timescales.

Deferred Benefits

% Deferred Benefits upon Leaving – Letter informing member of their deferred pension rights to be issued within 20 working days of receipt of all necessary information required to produce calculation - % calculated accurately and within timescales.

Reworking By Actuary

% of data sets provided to the Pension Fund actuary which required reworking on rejection by the actuary for higher than 1% inaccuracy and / or inadequacy as a % of the total number of such data sets provided to the actuary.

March 2018

	Success	Failures	Work completed outside of target (working days)						
			1-10	11-20	21-30	31-40	41-50	51-60	61+
Total	722	61	38	16	2	2	1	0	2
LGPS	638	53	34	14	2	2	1	0	0

Total number of cases = 3,820

KPI related = 783 (23.87%)

Non-KPI related = 2,497 (76.13%)

April 2018

	Success	Failures	Work completed outside of target (working days)						
			1-10	11-20	21-30	31-40	41-50	51-60	61+
Total	815	170	68	34	13	12	4	3	36
LGPS	718	146	54	33	13	8	2	3	33

Total number of cases = 3,435

KPI related = 985 (28.68%)

Non-KPI related = 2,450 (71.32%)

May 2018

	Success	Failures	Work completed outside of target (working days)						
			1-10	11-20	21-30	31-40	41-50	51-60	61+
Total	575	242	170	23	16	7	4	3	19
LGPS	489	208	149	16	15	6	4	3	15

Total number of cases = 3,404

KPI related = 817 (24%)

Non-KPI related = 2,587 (76%)