Caseload Performance – Local Government Pension Scheme

Detail of KPI	% Target	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19
Benefits Payments - Payments made to new pensioners within 10 working days of receipt of all information	97	74.40% 125/168	69.80% 145/208	76.20% 192/252	71.30% 164/230	79.60% 168/211	85.32% 279/327	86.96% 180/207	90.08% 227/252
Retirement Estimates - Estimates provided within 10 working days of receipt of all information	97.5	79.28% 88/111	85.60% 89/104	77.10% 74/96	53.70% 22/41	75.00% 75/100	72.26% 112/155	81.55% 84/103	78.86% 97/123
Deferred Benefits - Statements to deferred (members leaving eligible employment) 20 working days	97.5	93.45% 385/412	74.20% 222/299	87.30% 274/314	<mark>66.60%</mark> 506/760	54.30% 390/718	78.55% 1,461/1,860	94.70% 965/1,019	95.38% 578/606
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

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.