

Customer Journey Key Performance Indicators (statutory) for the Period 1 August to 30 September 2024

Function/Task	Indicator	Month	Completed	Within minimum service level	Under minimum service level	% Within minimum service level	Comments
Provide basic scheme information to new joiners.	2 months from date of joining or member's request.	August September	335 376	318 323	17 53	95 86	<p>The Pension Service is 100% within target for meeting the SLA of 2 months from the record being created on Altair which is dependent upon the receipt of the employer i-connect file</p> <p>The reason why the cases would not be completed within the statutory target is:</p> <ul style="list-style-type: none"> • Notifications of new starters received from employers within monthly i-connect files where the member's start date was already more than 2 months ago. <p>Successful performance was underreported for the period 1 January 2024 to 31 July 2024. *</p>
Provide transfer details for transfer in.	2 months from date of request.	August September	24 19	15 14	9 5	63 74	<p>Reasons why the cases would not be completed within the statutory target are¹:</p> <ul style="list-style-type: none"> • Interfund in - Further information is required from the previous LGPS pension fund & volume of cases in this area.

¹ An investigation into whether automated reporting can be developed to carry out the analysis required without any manual intervention is currently being undertaken. We aim to have the reporting developed for the first quarter of 2024/25.

*The improved percentages are as follows: January 2024 62% (previously 46%); February 2024 99% (previously 86%); March 86% (previously 60%); April 2024 78% (previously 63%), May 2024 99% (previously 90%), June 2024 92% (previously 75%), July 2024 95% (previously 80%)

Customer Journey Key Performance Indicators (statutory) for the Period 1 August to 30 September 2024

Function/Task	Indicator	Month	Completed	Within minimum service level	Under minimum service level	% Within minimum service level	Comments
							<ul style="list-style-type: none"> Transfer in – Further information is required from the member, the previous scheme, or the employer.
Provide details of transfer value for transfer out.	3 months from date of request.	August September	51 58	31 29	20 29	61 50	<p>Reasons why the cases would not be completed within the statutory target are²:</p> <ul style="list-style-type: none"> Interfund out - Further information is required from the employer prior to finalising the deferred benefit. Transfer out – Further information is required from the employer prior to finalising the deferred benefit.
Provide a CETV quotation for divorce purposes.	Within 3 months of the request (or shorter deadline as specified in a court order).	August September	24 16	17 10	7 6	71 63	The reason for the delays in processing these cases is the clearance of the backlog of cases at the calculation and checking stage.
Inform members who leave the scheme before retirement age of their rights and options.	As soon as practical and no more than 2 months of leaving.	August September	276 687	254 623	22 64	92 90	<p>The Pension Service is 100% within target for meeting the SLA of 2 months of the member leaving service.</p> <p>Reasons that KPIs may not be in target is due to employer delays including arrears of pay, late notification of leavers, payroll provider changes and processing times.</p>

² An investigation into whether automated reporting can be developed to carry out the analysis required without any manual intervention is currently being undertaken. We aim to have the reporting developed for the first quarter of 2024/25.

Customer Journey Key Performance Indicators (statutory) for the Period 1 August to 30 September 2024

Function/Task	Indicator	Month	Completed	Within minimum service level	Under minimum service level	% Within minimum service level	Comments
Inform members who leave the scheme at or after retirement age of the benefits due.	Within 2 months of retirement date where the member retires before normal pension age.	August September	20 43	12 38	8 5	60 88	<p>Multiple factors contribute to the member experience for this indicator, this includes the type of information required (e.g. leavers details, certificates, forms) and the party responsible for supplying the information (employer, payroll provider, member). There is also the processing time required for the administrator to issue the award once all the information is received.</p> <p>In August, within the 40% outside of target, 88% of the failures were due to employer delays.</p> <p>In September, within the 12% outside of target, 60% of failures were due to employer delays.</p> <p>Analysis will be undertaken, and any persistent trends addressed accordingly. Any information received which does not allow the Pension Service 10 working days to process in line with SLA targets is classified as an employer failure.</p>
Inform members who leave the	Within 1 month of retirement date	August September	9 19	3 14	6 5	33 74	Multiple factors contribute to the member experience for this indicator, this includes

Customer Journey Key Performance Indicators (statutory) for the Period 1 August to 30 September 2024

Function/Task	Indicator	Month	Completed	Within minimum service level	Under minimum service level	% Within minimum service level	Comments
scheme at or after retirement age of the benefits due.	where the member retires on or after normal pension age .						<p>the type of information required (e.g. leavers details, certificates, forms) and the party responsible for supplying the information (employer, payroll provider, member). There is also the processing time required for the administrator once all the information is received.</p> <p>In August, within the 67% outside of target, 83% of failures were due to employer delays.</p> <p>In September, within the 24% outside of target, 100% of failures were due to employer delays.</p> <p>Analysis will be undertaken, and any persistent trends addressed accordingly. Any information received which does not allow the Pension Service 10 working days to process in line with SLA targets is classified as an employer failure.</p>
Calculate and notify dependant(s) of amount of death benefits.	As soon as possible, but in any event no more than 2 months of date or becoming aware of death.						<p>New death processes are currently being created to enable reporting on this KPI. This is not currently possible as a separate case is set up on the member and the dependant.</p> <p>It is anticipated that the reporting for this KPI will commence in the 1st quarter of the 25/26 financial year.</p>

Customer Journey Key Performance Indicators (statutory) for the Period 1 August to 30 September 2024

Function/Task	Indicator	Month	Completed	Within minimum service level	Under minimum service level	% Within minimum service level	Comments
<p>Notify implementation information after receiving a pension sharing order (and no outstanding information)</p>	<p>Within 21 days of the later of, the date of receipt of the pension sharing order or the day on which the order takes affect or the date of receipt of the relevant documents / information.</p>						<p>Where there is no outstanding information, the Service has a period of 4 months to implement the order from the later of:</p> <ul style="list-style-type: none"> • The day on which the relevant Order or provision comes into effect; or • The day in which the administering authority is in receipt of the relevant “Matrimonial Documents” <p>A letter must be sent within 21 “days” of the later of the above two dates notifying the relevant parties of the implementation deadline.</p>