

Appendix 2 – Customer Journey Key Performance Indicators (statutory) for the Period 1 April to 31 July 2024

Function/Task	Indicator	Month	Completed	Within target	Over target	% Within Target	Comments
Provide basic scheme information to new joiners.	2 months from date of joining or member's request.	April May June July	N/A 736 513 442	N/A 660 386 352	N/A 76 127 90	63 90 75 80	<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<sup>1</sup>:</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>
Provide transfer details for transfer in.	2 months from date of request.	April May June July	N/A 23 26 23	N/A 15 17 14	N/A 8 9 9	25 65 65 61	<p>Reasons why the cases would not be completed within the statutory target are<sup>2</sup>:</p> <ul style="list-style-type: none"> <li>• Interfund in - Further information is required from the previous LGPS pension fund &amp; volume of cases in this area.</li> <li>• Transfer in – Further information is required from the member, the previous scheme, or the employer.</li> </ul>
Provide details of transfer value for transfer out.	3 months from date of request.	April May June July	N/A 36 32 57	N/A 29 19 33	N/A 7 13 24	46 81 59 58	<p>Reasons why the cases would not be completed within the statutory target are<sup>3</sup>:</p> <ul style="list-style-type: none"> <li>• Interfund out - Further information is required from the employer prior to finalising the deferred benefit.</li> <li>• Transfer out – Further information is required from the employer prior to finalising the deferred benefit.</li> </ul>

<sup>1</sup> Reports are being developed to identify any arrears of pay cases in advance, the software provider is investigating solutions to identify new starter records that are created as a result of arrears as soon as the data is received on the system.

<sup>2</sup> 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.

<sup>3</sup> 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.

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Provide a CETV quotation for divorce purposes.	Within 3 months of the request (or shorter deadline as specified in a court order).	April May June July	N/A 24 13 13	N/A 19 8 12	N/A 5 5 1	88 79 62 92	For the period 1 April to 31 July, the performance was below target due to the clearance of the backlog relating to McCloud. Performance is expected to improve in the coming months as the McCloud backlog has been completely cleared as of 31 July
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.	April May June July	325 346 273 258	223 298 229 231	102 48 44 27	68 86 83 89	The Pension Service is 100% within target for meeting the SLA of 2 months of the member leaving service.  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.
Inform members who leave the scheme at or after retirement age of the benefits due.	Within 2 months of retirement date where the member <b>retires before</b> normal pension age.	April May June July	N/A 14 21 20	N/A 10 11 13	N/A 4 10 7	81 71 52 65	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.  In <b>April</b> , within the 19% outside of target, 100% of the failures were due to employer delays. In <b>May</b> , within the 29% outside of target, 75% of the failures were due to employer delays. In <b>June</b> , within the 48% outside of target, 50% of the failures were due to employer delays. In <b>July</b> , within the 35% outside of target, 86% of the failures were due to employer delays.  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.

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Inform members who leave the scheme at or after retirement age of the benefits due.	Within 1 month of retirement date where the member retires <b>on or after normal pension age.</b>	April May June July	N/A 4 26 16	N/A 12 5 8	N/A 25 21 8	36 25 19 50	<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 once all the information is received.</p> <p>In <b>April</b> within the 64% outside target, 78% was due to delays from the employer.                      In <b>May</b>, within the 75% outside of target, 100% was due to delays from the employer.                      In <b>June</b>, within the 81% outside of target, 62% was due to delays from the employer.                      In <b>July</b>, within the 50% outside of target, 75% was due to delays from the employer.</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.						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.

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Notify implementation information after receiving a pension sharing order (and no outstanding information)	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>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"> <li>• The day on which the relevant Order or provision comes into effect; or</li> <li>• The day in which the administering authority is in receipt of the relevant “Matrimonial Documents”</li> </ul> <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>