

Agenda Item No. 8
Appendix A

Caseload Performance – Local Government Pensions Scheme

	Detail	Target %	Jan 17	Feb 17	Mar 17	Apr 17	May 17	Jun 17	Jly 17	Aug 17
Benefit Payments	Payments made to new pensioners within 10 working days of receipt of all information	97.00	95.3% 181/190	95.9% 141/147	96.6% 144/149	81.5% 110/135	81.0% 124/153	86.8% 132/152	95.4% 125/131	96.3% 26/27
Retirement Estimates	Estimates provided within 10 working days of receipt of all information	97.50	80.1% 141/176	81.0% 111/137	63.6% 168/264	61.9% 109/176	64.5% 151/234	66.7% 156/234	58% 119/205	82.7% 67/81
Deferred Benefits	Statements to deferred (members leaving eligible employment) 20 working days	97.5	50.6% 40/79	42.0% 21/50	39.3% 35/89	14.0% 48/342	9.9% 14/141	17.8% 32/180	60.7% 37/61	83.3% 5/6
Reworking by Actuary	Rejection by the actuary for higher than 1% inaccuracy*	0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

*This KPI is reported annually in October

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.

Commentary

Performance has not achieved target for some months. A plan to clear the backlog was agreed with Capita and this is currently underway and the backlog is expected to clear by the end of December 2017.