Appendix B – Customer Journey Key Performance Indicators (statutory) for the Period 1 July to 31 December 2023

Function/Task	Indicator	Month	% Within Target	Comments
Provide basic scheme information to new joiners.	2 months from date of joining or member's request.	July August September October November December	60 75 77 89 38 69	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.
Provide transfer details for transfer in.	2 months from date of request.	July August September October November December	61 73 77 55 37 46	Analysis has not been carried out but reasons why the cases would not be completed within the statutory target are: • Interfund in - Further information is required from the previous LGPS pension fund & volume of cases in this area. • Transfer in – Further information is required from the member, the previous scheme, or the employer. An investigation into whether automated reporting can be developed to carry out the analysis required without any manual intervention is currently being undertaken.
Provide details of transfer value for transfer out.	3 months from date of request.	July August September October November December	84 91 76 100 97 67	Analysis has not been carried out but reasons why the cases would not be completed within the statutory target are: •Interfund out - Further information is required from the employer prior to finalising the deferred benefit and the volume of cases in this area. •Transfer out – Further information is required from the employer prior to finalising the deferred benefit. Low volumes of transfer out cases also affects the performance, for December 13 cases were processed with 2 missing the target.
Provide a CETV quotation for divorce purposes.	Within 3 months of the request (or shorter deadline as specified in a court order).	July August September October November December	100 100 100 95 67 100	Cases were not within the statutory target in October and November as a result of a backlog in checking being cleared in these months. The backlog was created from the clearance of cases that were on hold as a result of the GAD factor changes.

Function/Task	Indicator	Month	% Within Target	Comments
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.	November	87	An automated process is in place for when leaver information is received from employers for issuing members with their rights and options and as such, any delays with the notification being issued would be a result of late notification from the employer unless there was a system failure. The letter is issued after the second i-connect file is received to allow for any corrections such as a member starting a new employment from the following day. For November, 24 employers (consisting of 51 members) submitted data late. The results will be analysed internally to identify any patterns and raised accordingly.
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.			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. Reporting is being developed to provide a detailed analysis of the cases that do not meet this target and to identify the underlying causes to why the target is missed. This will then enable us to tackle the root causes
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 **on or after normal pension age.**			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. Reporting is being developed to provide a detailed analysis of the cases that do not meet this target and to identify the underlying causes to why the target is missed. This will then enable us to tackle the root causes.

Appendix B – Customer Journey Key Performance Indicators (statutory) for the Period 1 July to 31 December 2023

Function/Task	Indicator	Month	% Within Target	Comments
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.			A new death process is due to be 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.
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.			This KPI still needs to be developed for the small number of cases that are completed in a year.