

Appendix B – Customer Journey Key Performance Indicators (statutory) for the Period 1 November 2023 to 31 January 2024

Function/Task	Indicator	Month	% Within Target	Comments
Provide basic scheme information to new joiners.	2 months from date of joining or member's request.	November December January	38 69 60	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. Reasons why the cases would not be completed within the statutory target are ¹ : <ul style="list-style-type: none"> • Arrears of pay resulting from a late agreed pay award. • 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. • Payroll provider changes.
Provide transfer details for transfer in.	2 months from date of request.	November December January	37 46 37	Reasons why the cases would not be completed within the statutory target are ² : <ul style="list-style-type: none"> • Interfund in - Further information is required from the previous LGPS pension fund. • 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.	November December January	97 67 80	Reasons why the cases would not be completed within the statutory target are ³ : <ul style="list-style-type: none"> • Interfund out - Further information is required from the employer prior to finalising the deferred benefit and there is a backlog in these cases due to the volumes. • Transfer in – 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).	November December January	67 100 100	Cases were not within the statutory target in November as a result of a backlog in checking being cleared in this month. The backlog was created from the clearance of cases that were on hold as a result of the GAD factor changes.

¹ 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.

² An investigation into whether automated reporting can be developed to carry out the analysis required without any manual intervention is currently being undertaken.

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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.			Complexities in the way data is received and processed means that the reporting for this KPI needs developing to be able to establish the correct apportion between employer and pension service failures. Reasons that KPIs may not be in target is due to 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 retires before normal pension age.	January	33	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. Within the 67% outside of target, approximately 2/3 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.
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.	January	57	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. Within the 43% outside of target, 100% was due to delays from the employer, 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.
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.

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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.			This KPI still needs to be developed for the small number of cases that are completed in a year.