

**Clwyd Pension Fund - Administration Strategy Key Performance Indicators**

	Process	Legal Requirement	A						B						C								
			% <sup>1</sup>	No. <sup>2</sup>	% <sup>1</sup>	No. <sup>2</sup>	% <sup>1</sup>	No. <sup>2</sup>	Overall	% <sup>3</sup>	No. <sup>2</sup>	% <sup>3</sup>	No. <sup>2</sup>	% <sup>3</sup>	No. <sup>2</sup>	CPF Administration element target	% <sup>3</sup>	No. <sup>2</sup>	% <sup>3</sup>	No. <sup>2</sup>	% <sup>3</sup>	No. <sup>2</sup>	
			Oct-17	Nov-17	Dec-17	Oct-17	Nov-17	Dec-17	Oct-17	Nov-17	Dec-17	Oct-17	Nov-17	Dec-17	Oct-17	Nov-17	Dec-17						
1	To send a Notification of Joining the LGPS to a scheme member	2 months from date of joining (assuming notification received from the employer), or within 1 month of receiving jobholder information where the individual is being automatically enrolled / re-enrolled	72%	355					46 working days from date of joining (ie 2 months)	72%	355					15 working days from receipt of all information	97%	355					
2	To inform members who leave the scheme of their leaver rights and options	As soon as practicable and no more than 2 months from date of initial notification (from employer or from scheme member)	98%	165					46 working days from date of leaving	46%	165					15 working days from receipt of all information	48%	165					
3	Obtain transfer details for transfer in, and calculate and provide quotation to member	2 months from the date of request	48%	21					46 working days from date of request	48%	21					20 working days from receipt of all information	95%	21					
4	Provide details of transfer value for transfer out, on request	3 months from date of request (CETV estimate)	96%	53					46 working days from date of request	92%	53					20 working days from receipt of all information	92%	53					
5	Notification of amount of retirement benefits	1 month from date of retirement if on or after Normal Pension Age or 2 months from date of retirement if before Normal Pension Age <sup>4</sup>	79%	84					23 working days from date of retirement	85%	84					10 working days from receipt of all information	93%	84					
6	Providing quotations on request for retirements	As soon as is practicable, but no more than 2 months from date of request unless there has already been a request in the last 12 months	71%	59					46 working days from date of request	71%	59					15 working days from receipt of all information	54%	59					
7	Calculate and notify dependant(s) of amount of death benefits	As soon as possible but in any event no more than 2 months from date of becoming aware of death, or from date of request by a third party (e.g. personal representative)	50%	10					25 working days from date of death	10%	10					15 working days from receipt of all information	10%	10					