

Key Performance Indicators

The following pages show the performance against the key performance indicators (KPIs) which have been agreed within Clwyd Pension Fund's Administration Strategy. They cover thirteen areas of work, and for each there is a KPI for each of the following:

- The legal timescale that must be met
- The overall timescale for the process (including any time taken by employers and/or scheme members)
- The timescale relating to the Clwyd Pension Fund administration team only

The KPIs are specific to each process (as set out in the Administration Strategy) and illustrated by the graphs are as follows:

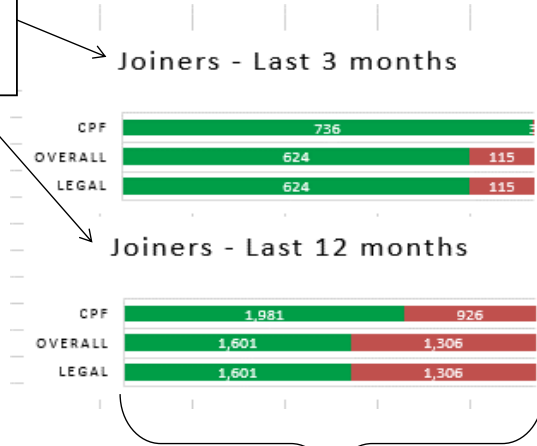
		A	B	C
	Process	Legal Requirement	Overall	CPF Administration element target
1	To send a Notification of Joining the LGPS to a scheme member	2 months from date of joining (assuming notification received from the employer), or within 1 month of receiving jobholder information where the individual is being automatically enrolled / re-enrolled	46 working days from date of joining (i.e. 2 months)	30 working days from receipt of all information
2	To inform members who leave the scheme before retirement age 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)	46 working days from date of leaving	15 working days from receipt of all information
3	Obtain transfer details for transfer in, and calculate and provide quotation to member	2 months from the date of request	46 working days from date of request	20 working days from receipt of all information
4	Provide details of transfer value for transfer out, on request	3 months from date of request (CETV estimate) 3 or within a reasonable period (cash transfer sum)	46 working days from date of request	20 working days from receipt of all information
5	Notification of amount of retirement benefits	1 month from date of retirement if on or after Normal Pension Age	23 working days from date of retirement	10 working days from receipt of all information
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	46 working days from date of request	15 working days from receipt of all information
7	Calculate and notify dependant(s) of amount of death benefits	As soon as possible but in any event no more than 2 months to beneficiary from date of becoming aware of death, or from a date of request by a third party (e.g. personal representative)	25 working days from date of death	10 working days from receipt of all information
8	Calculate and Notify member of CETV for Divorce/Dissolution Quote	3 months from the date of request	46 working days from date of request	20 working days from receipt of all information
9	Calculate and Notify members of Actual Divorce Share	4 months from the date of the pension sharing order, or the date where all sufficient information is received to implement the order	46 working days from date of request	15 working days from receipt of all information
10	Calculate and pay a Refund of contributions	Not applicable	13 working days from receipt of request	10 working days from receipt of all information
11	Calculate and Pay retirement lump sum	Not applicable	Not applicable	15 working days from receipt of all information
12	Calculate and Notify member of Deferred Benefits	Not applicable	76 working days from date of leaving	30 working days from receipt of all information
13	Initial letter acknowledging death of member	Not applicable	Not applicable	3 working days from receipt of all information

Interpretation of graphs

One graph has been provided for each KPI in the table above.

This is illustrated further below.

Each KPI shows the stats for the previous 3 months and the previous 12 months



Change in % completed within KPI	Change in number completed
1%	409
1%	409
1%	409
0%	0
0%	0
0%	0

This column tells you the change in % completed within the KPI target compared to either the 3 months before last or the 12 months before last.

This column tells you the change in number of tasks completed over either the 3 months before last or the 12 months before last.

Green bars represent total cases completed that were within the KPI target in the relevant period. Red bars represent the total number of cases completed that were not done within the KPI target in the relevant period.

Key Performance Indicators - Executive Summary - to February 2023

Joiners - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	869 / 171	2%	-154
OVERALL	869 / 171	2%	-154
CPF	1,030 / 10	-1%	-154

Joiners - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	3,634 / 570	2%	141
OVERALL	3,634 / 570	2%	141
CPF	4,186 / 18	0%	141

Leavers - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	542 / 2	0%	-168
OVERALL	265 / 279	-18%	-168
CPF	542 / 2	0%	-168

Leavers - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	1,920 / 6	0%	-330
OVERALL	1,184 / 742	14%	-330
CPF	1,916 / 10	1%	-330

Transfers In - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	77 / 7	8%	-3
OVERALL	77 / 7	8%	-3
CPF	52 / 32	-24%	-3

Transfers In - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	308 / 44	10%	40
OVERALL	308 / 44	10%	40
CPF	281 / 71	12%	40

Transfers Out - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	89 / 2	-2%	-87
OVERALL	88 / 3	-2%	-87
CPF	68 / 23	-14%	-87

Transfers Out - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	563 / 6	1%	128
OVERALL	553 / 16	2%	128
CPF	495 / 74	9%	128

Retirements - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	262 / 48	-1%	-185
OVERALL	244 / 66	5%	-185
CPF	301 / 9	5%	-185

Retirements - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	1,340 / 272	-2%	96
OVERALL	1,159 / 453	-2%	96
CPF	1,502 / 110	2%	96

Quotations - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	263 / 2	2%	75
OVERALL	263 / 2	2%	75
CPF	250 / 15	22%	75

Quotations - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	785 / 12	-1%	-138
OVERALL	785 / 12	-1%	-138
CPF	700 / 97	-2%	-138

Deaths - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	32 / 12	9%	-5
OVERALL	11 / 33	3%	-5
CPF	37 / 7	27%	-5

Deaths - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	146 / 50	-13%	-21
OVERALL	44 / 152	-16%	-21
CPF	130 / 66	-14%	-21

Divorce Quote - Last 3 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	25 / 0	0%	-9
OVERALL	25 / 0	0%	-9
CPF	22 / 3	-12%	-7

Divorce Quote - Last 12 months

	Completed	Change in % completed within KPI	Change in number completed
LEGAL	119 / 0	1%	27
OVERALL	119 / 0	1%	27
CPF	111 / 0	5%	19

Divorce Share - Last 3 months

Change in % completed within KPI Change in number completed



n/a 1
n/a 1
n/a 1

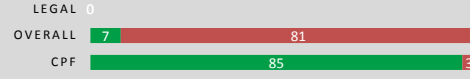
Divorce Share - Last 12 months



0% -2
40% -2
0% -2

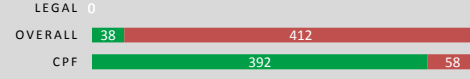
Refund - Last 3 months

Change in % completed within KPI Change in number completed



0% -43
3% -43

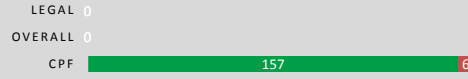
Refund - Last 12 months



-3% 130
5% 130

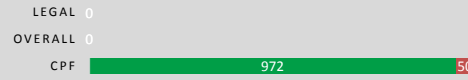
Retirement Lump Sum - Last 3 months

Change in % completed within KPI Change in number completed



2% -158

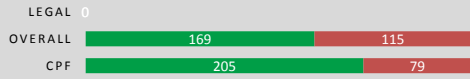
Retirement Lump Sum - Last 12 months



-1% 33

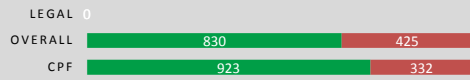
Deferred Benefits - Last 3 months

Change in % completed within KPI Change in number completed



-10% -109
-6% -109

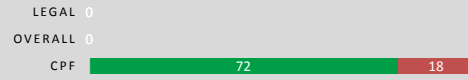
Deferred Benefits - Last 12 months



29% -464
40% -464

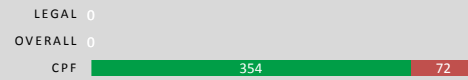
Death Acknowledgment - Last 3 months

Change in % completed within KPI Change in number completed



-4% -9

Death Acknowledgment - Last 12 months



5% 37