Appendix 2

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 seven 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 / reenrolled	46 working days from date of joining (ie 2 months)	15 working days from receipt of all information
		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
2	To inform members who leave the scheme of their leaver rights and options	2 months from the date of request	46 working days from date of request	20 working days from receipt of all information
3	Obtain transfer details for transfer in, and calculate and provide quotation to member	3 months from date of request (CETV estimate)	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	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 [4]	23 working days from date of retirement	10 working days from receipt of all information
5	Notification of amount of retirement benefits	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
6	Providing quotations on request for retirements	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)	25 working days from date of death	10 working days from receipt of all information
7	Calculate and notify dependant(s) of amount of death benefits			

Interpretation of graphs

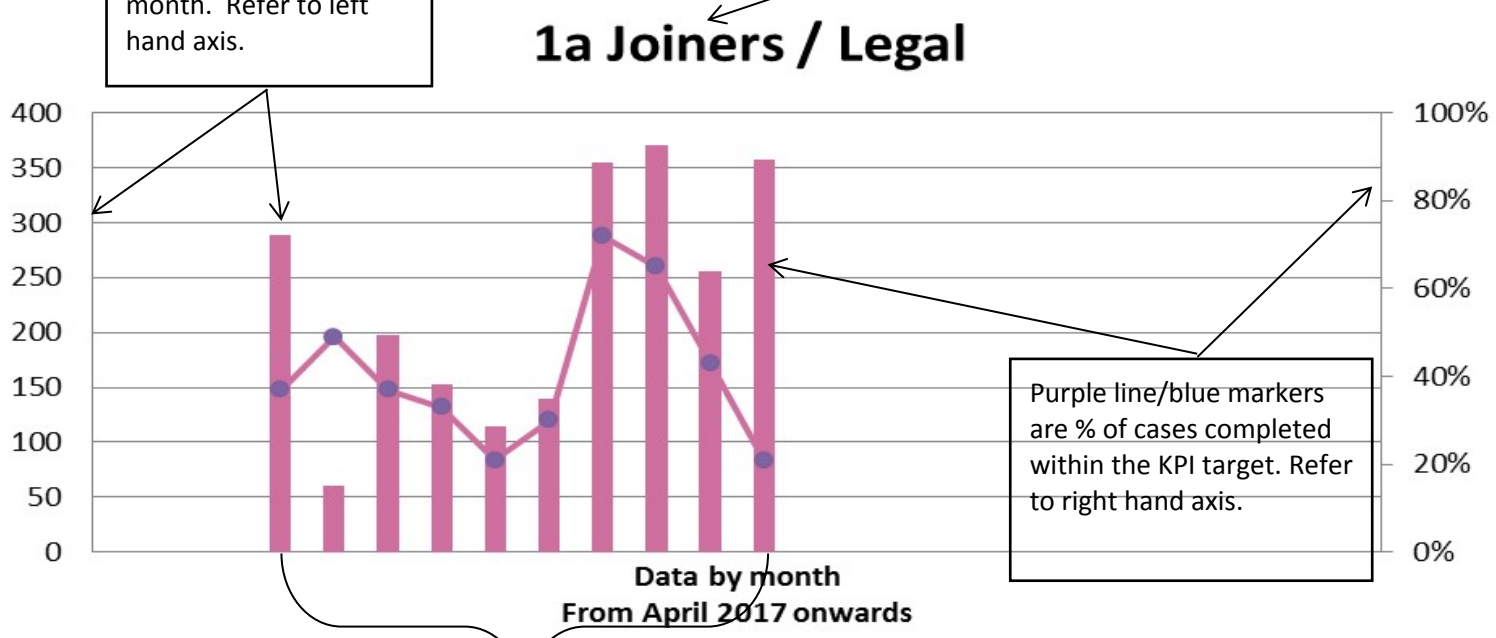
One graph has been provided for each KPI in the table above. Each graph shows month by month:

- The number of cases which have been completed each month
- The percentage of those cases completed that were completed within the KPI target

This is illustrated further below.

This tells you what KPI is shown as per the previous page. So this is process "1" ("To send a Notification of Joining the LGPS to a scheme member") and KPI "A" ("Legal requirement")

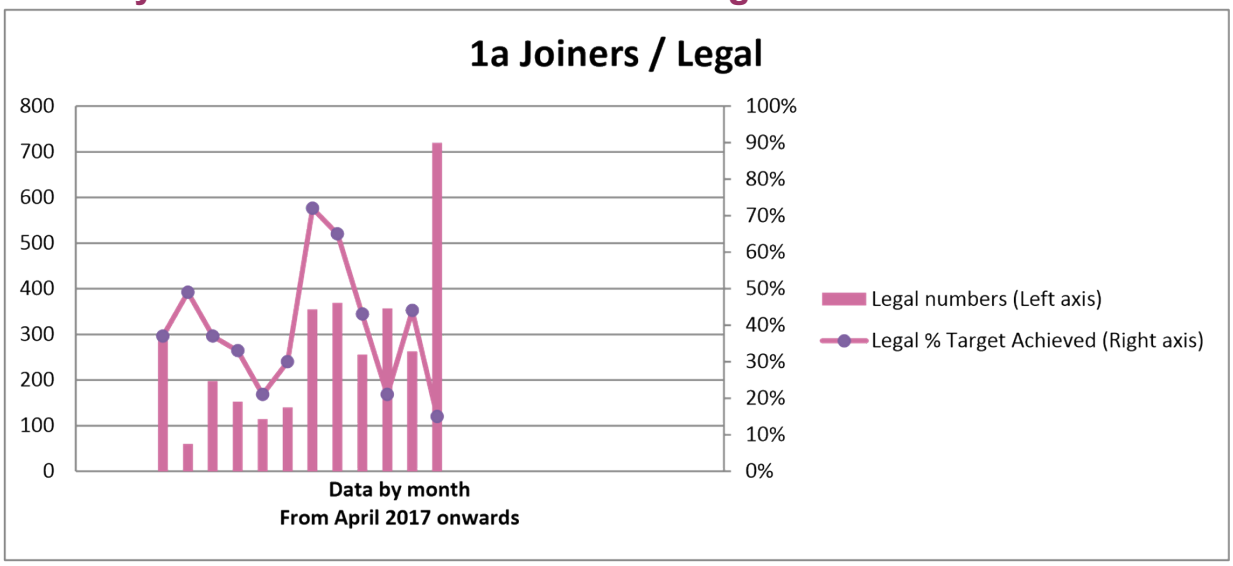
Purple bars are numbers of cases completed in the month. Refer to left hand axis.

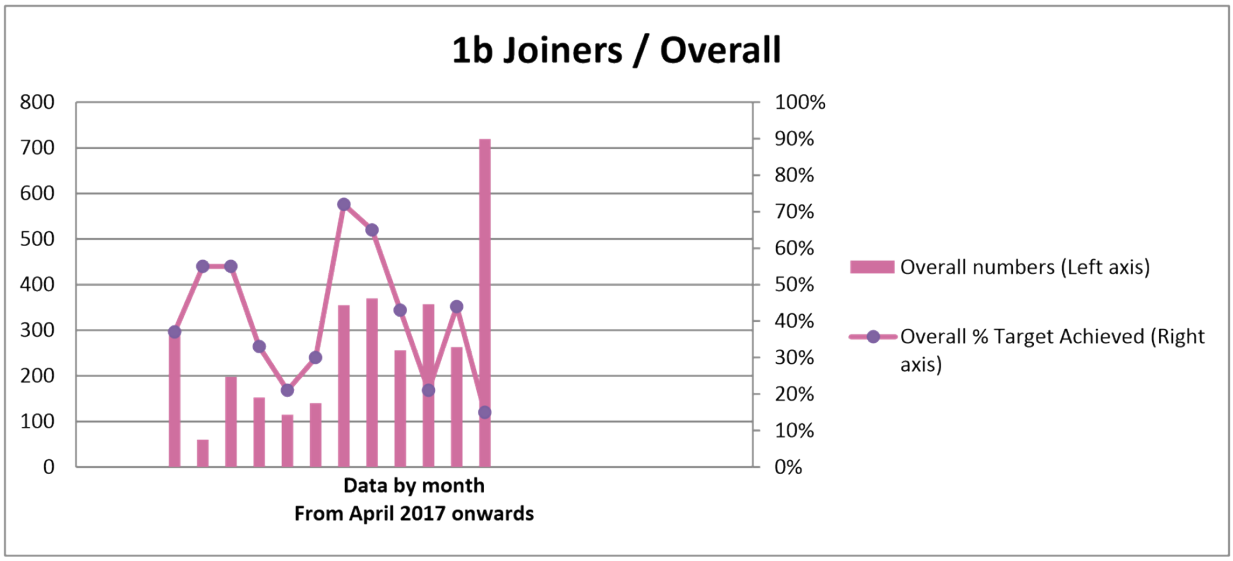


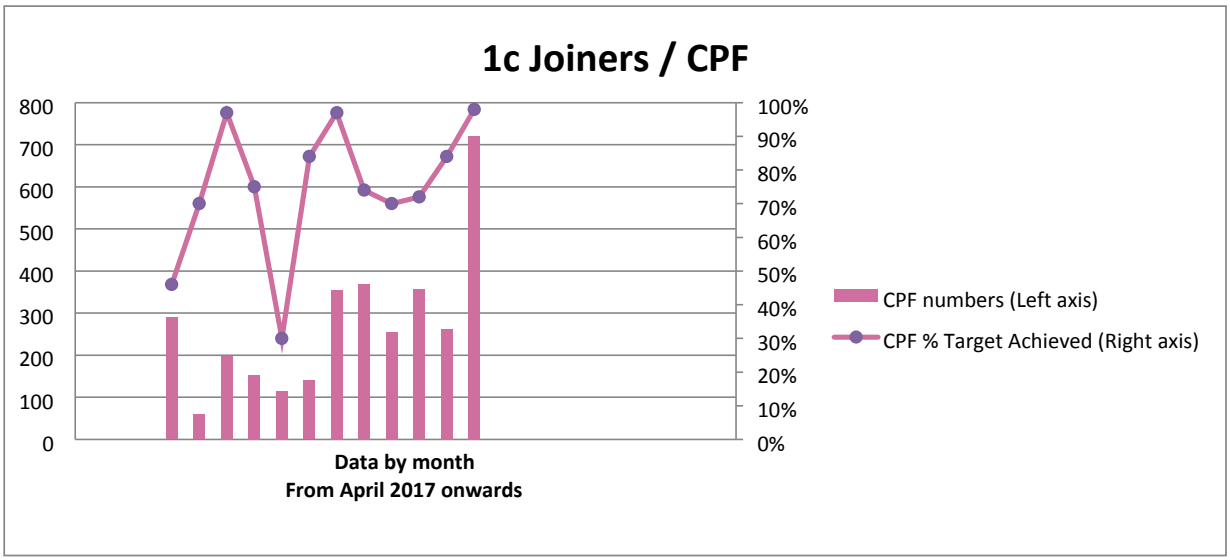
Purple line/blue markers are % of cases completed within the KPI target. Refer to right hand axis.

Each bar and blue marker relates to a calendar month starting April 2017. The one on the most right is the latest month. So in this graph, it shows April 2017 to January 2018.

Key Performance Indicators - relating to 31 March 2018







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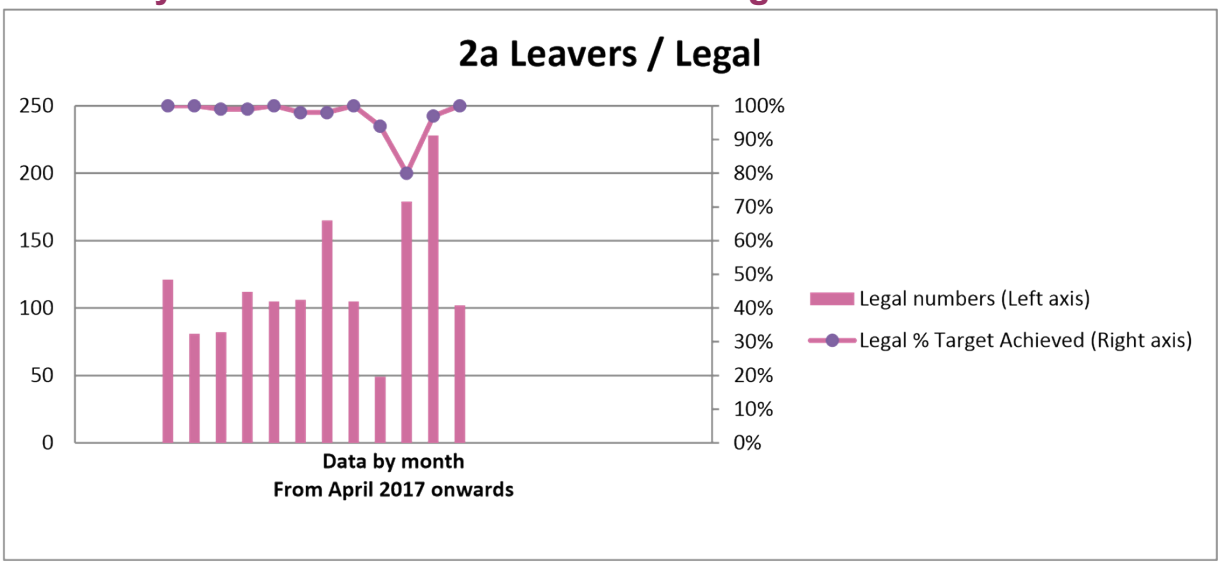

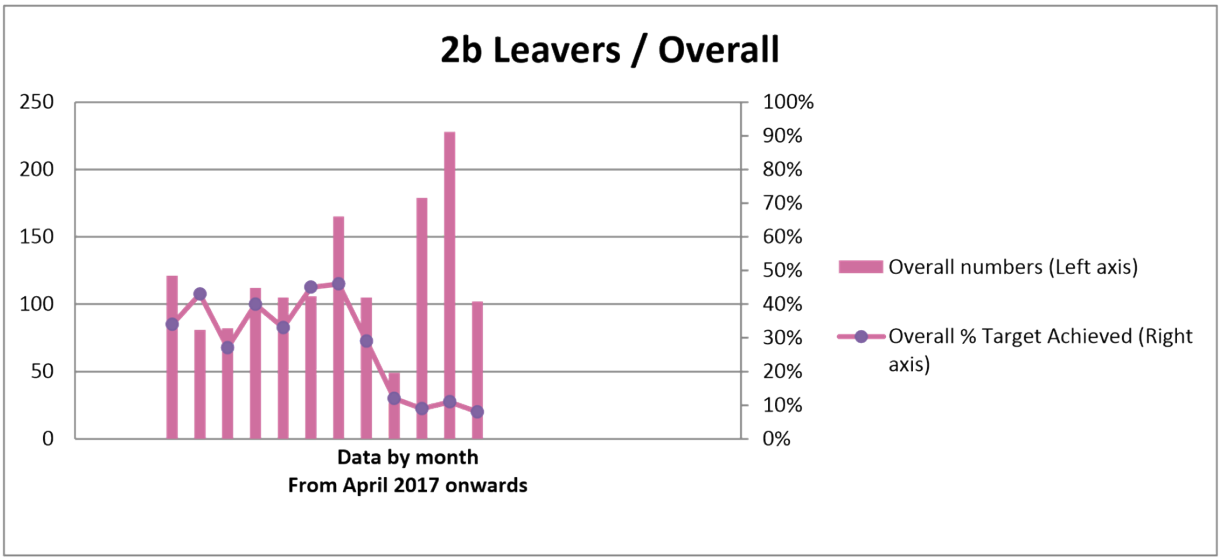

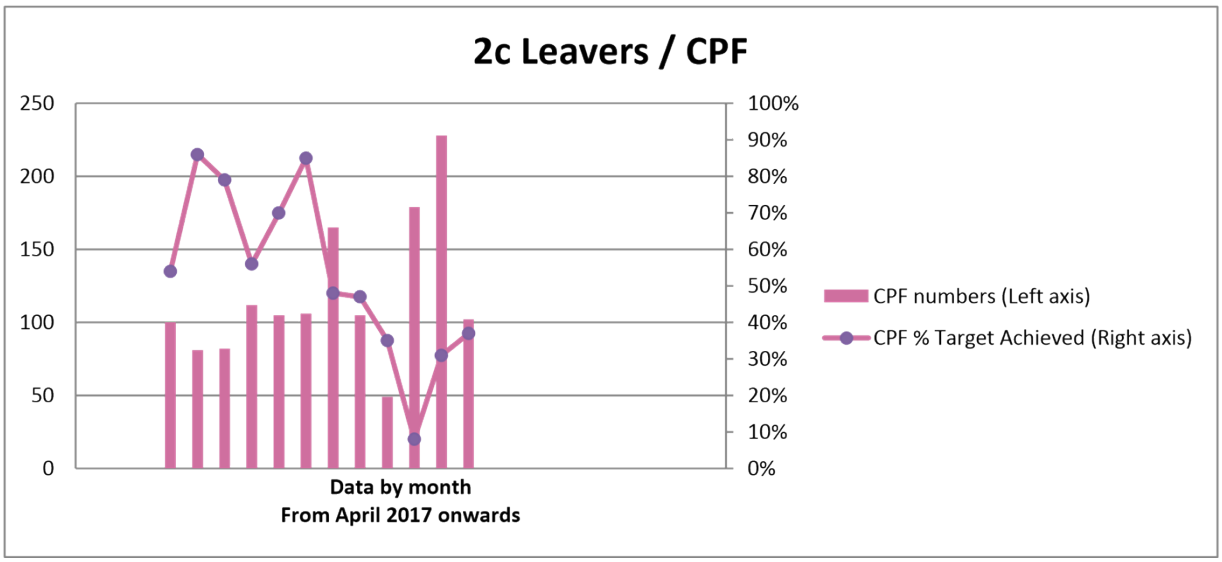

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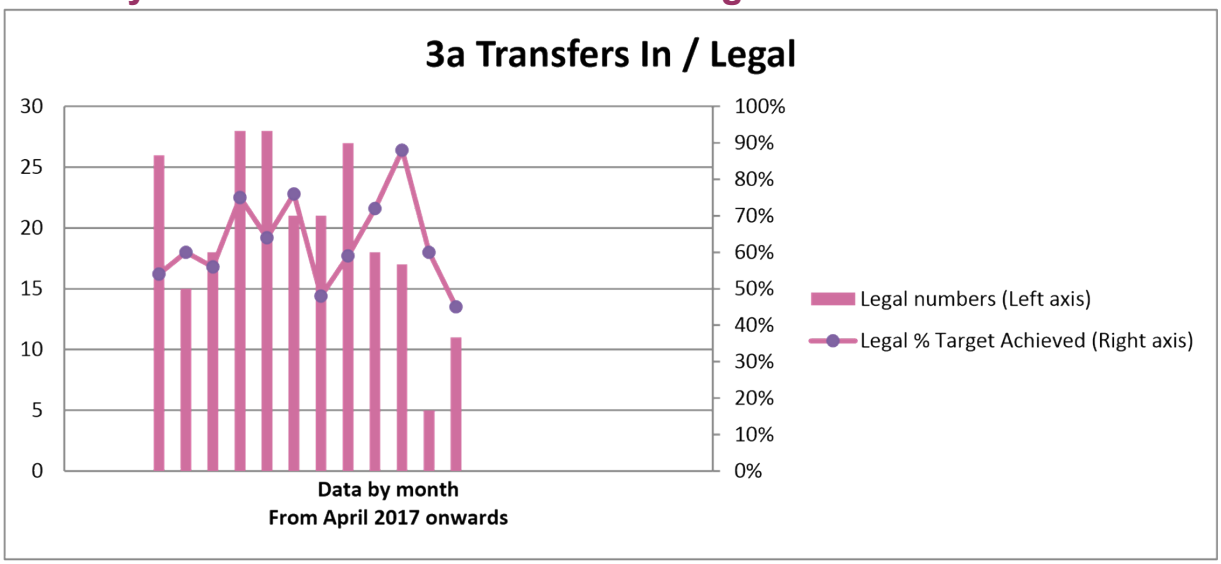

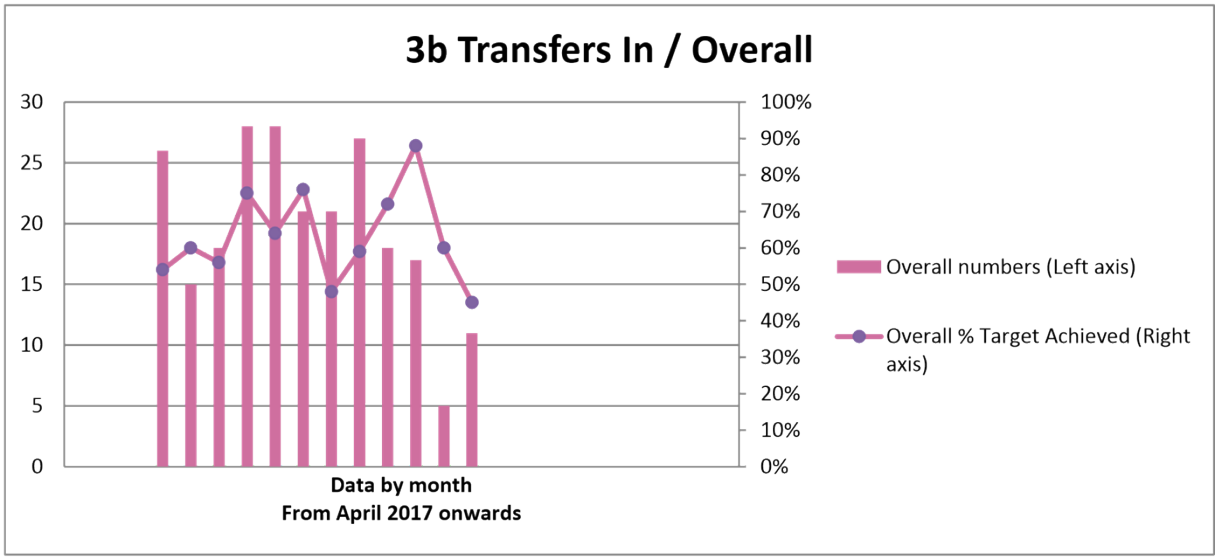

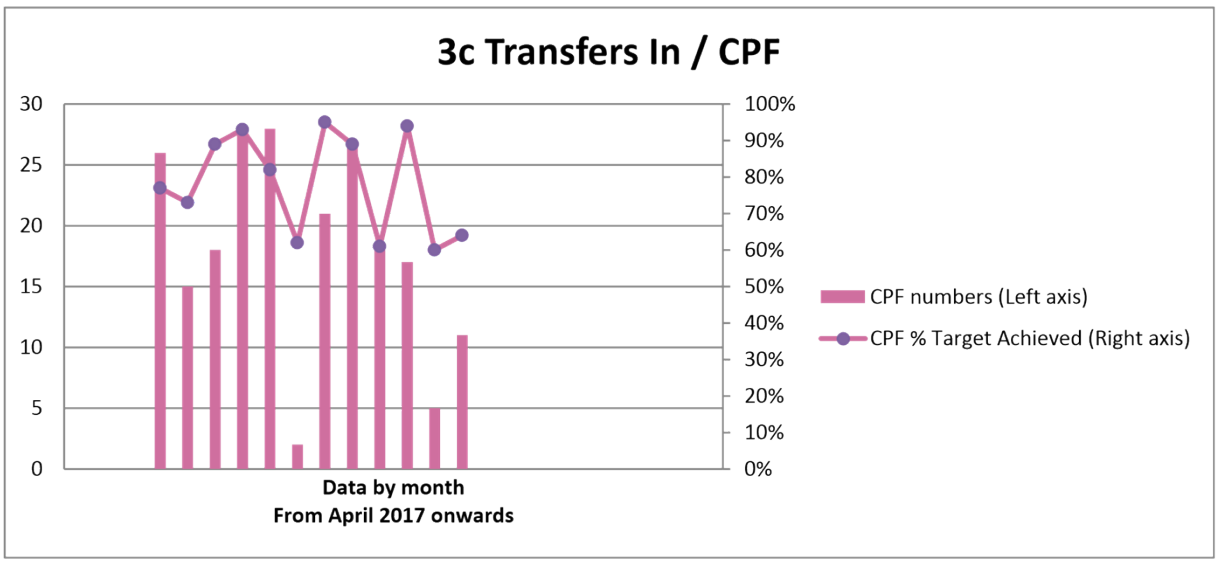

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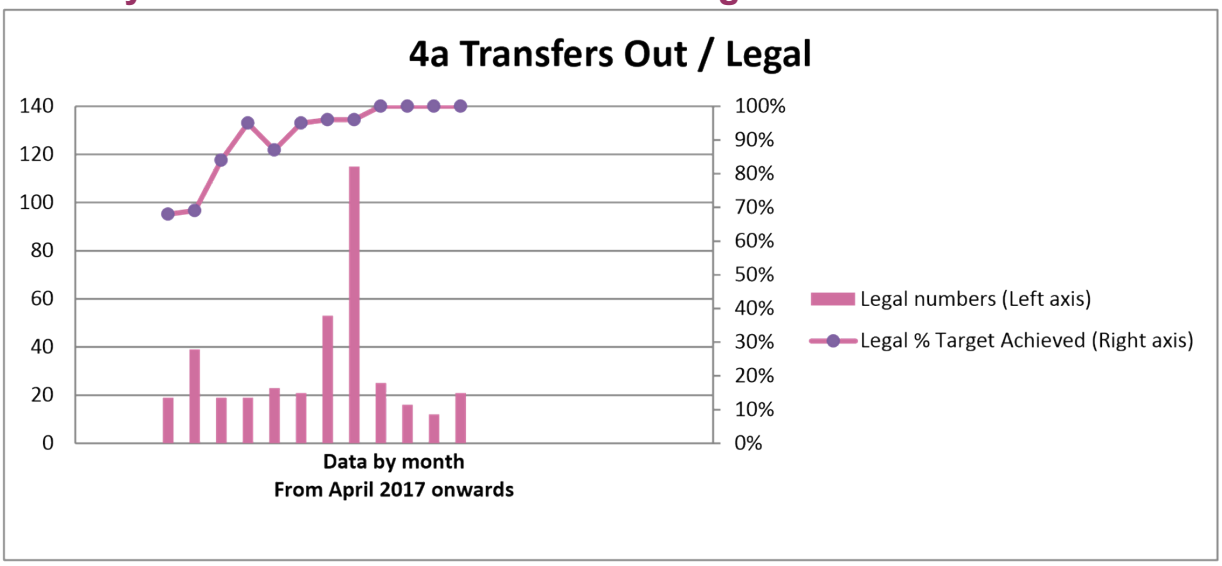

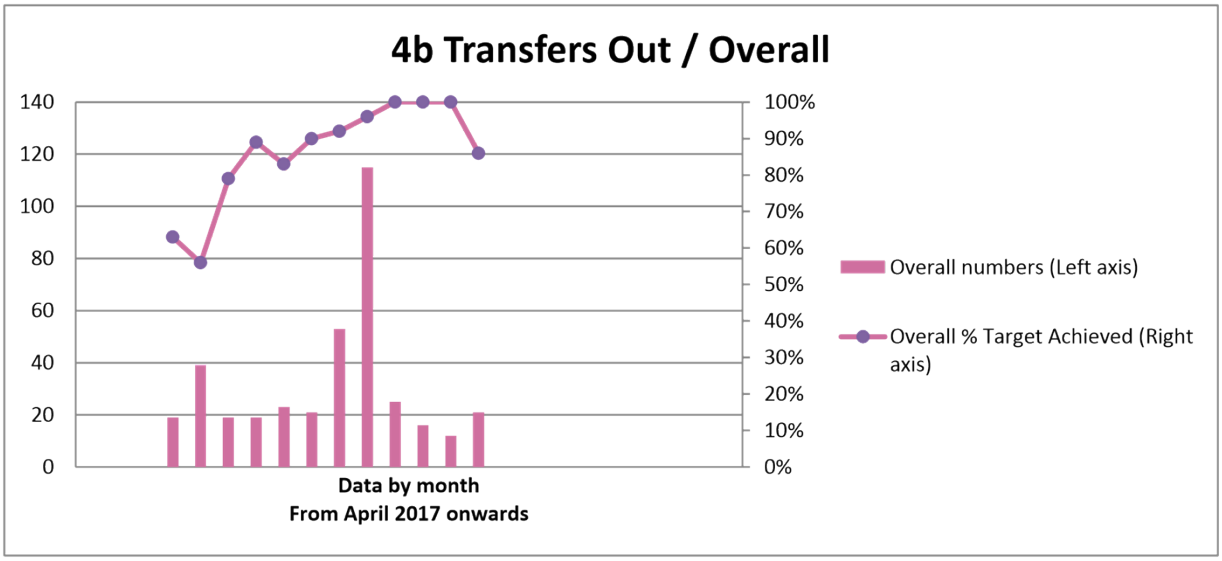

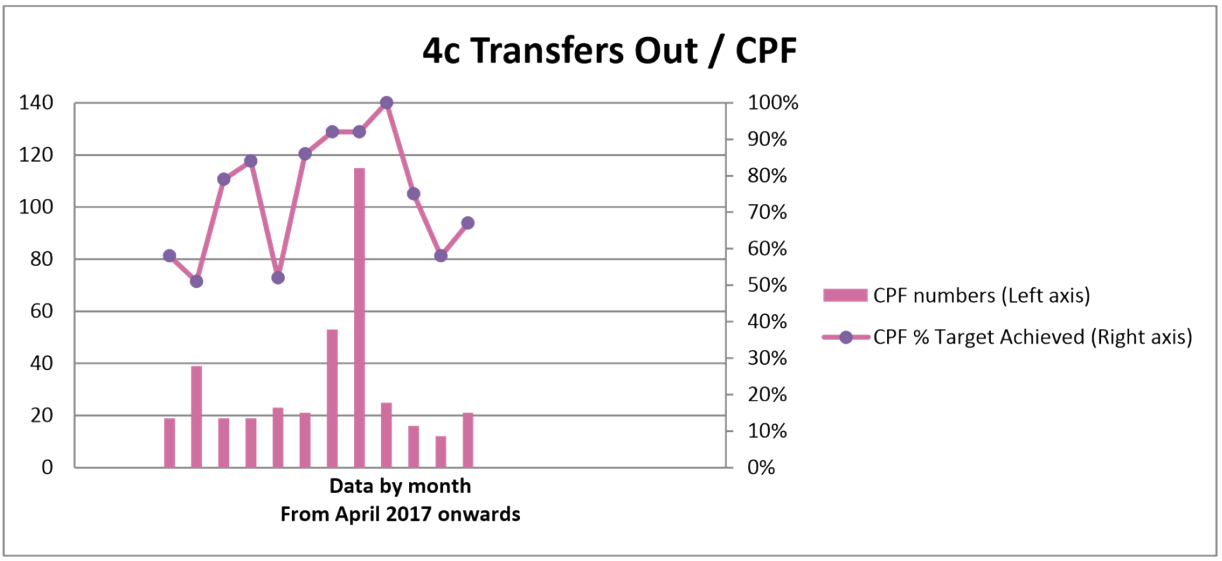

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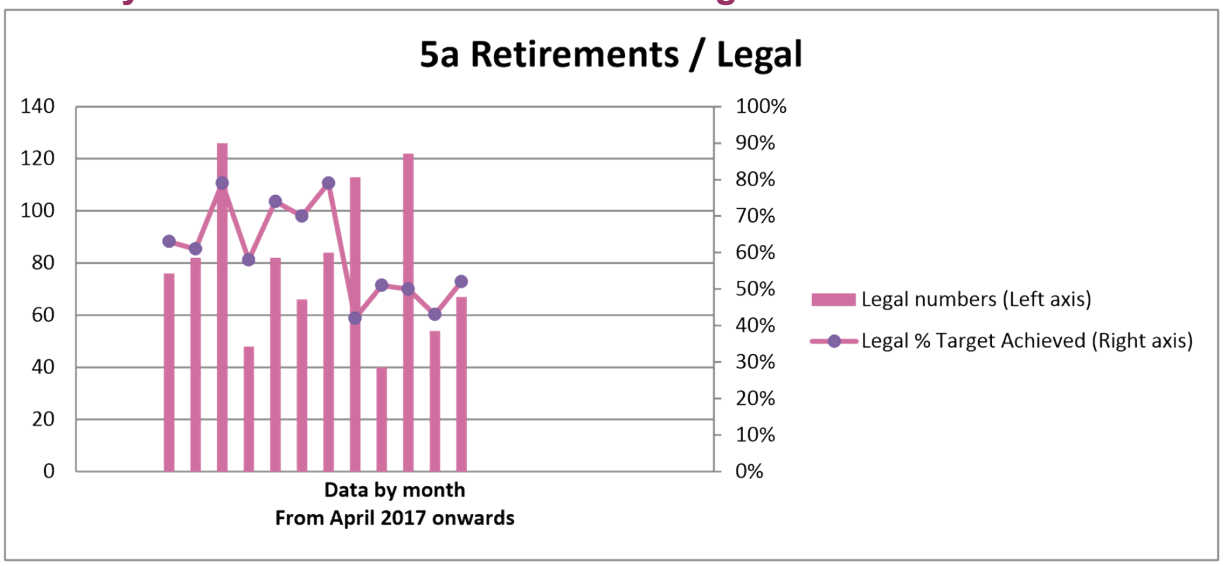

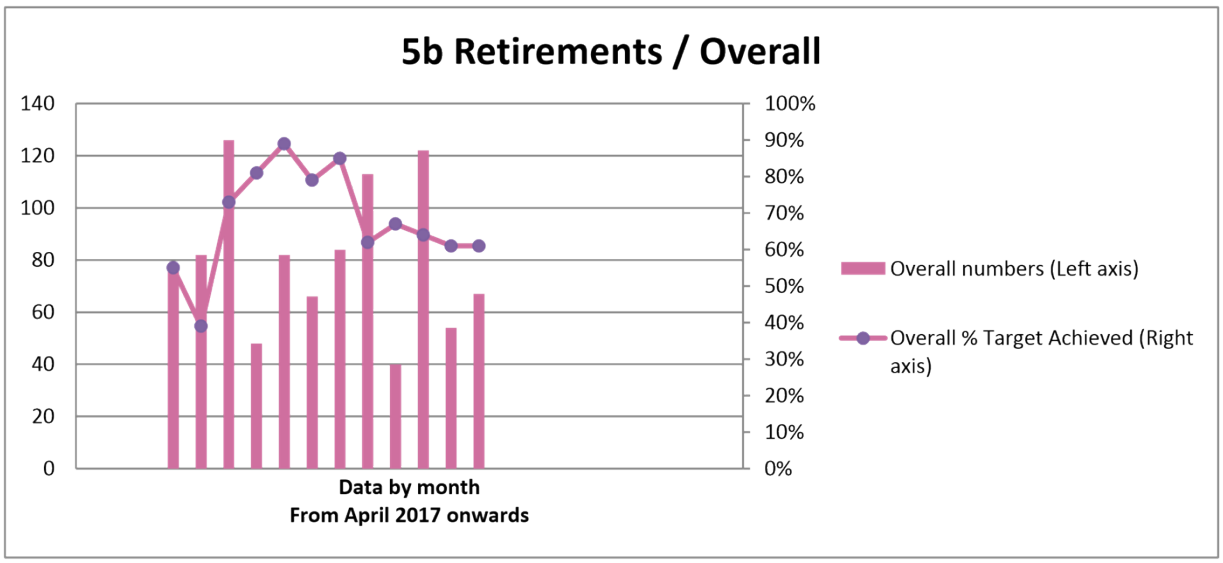

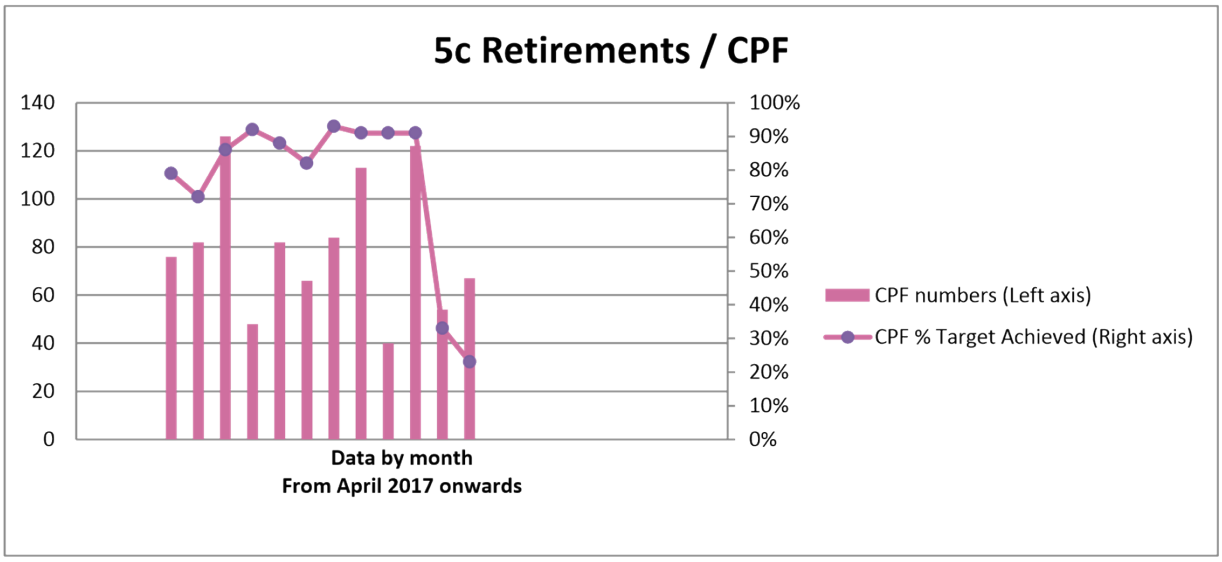

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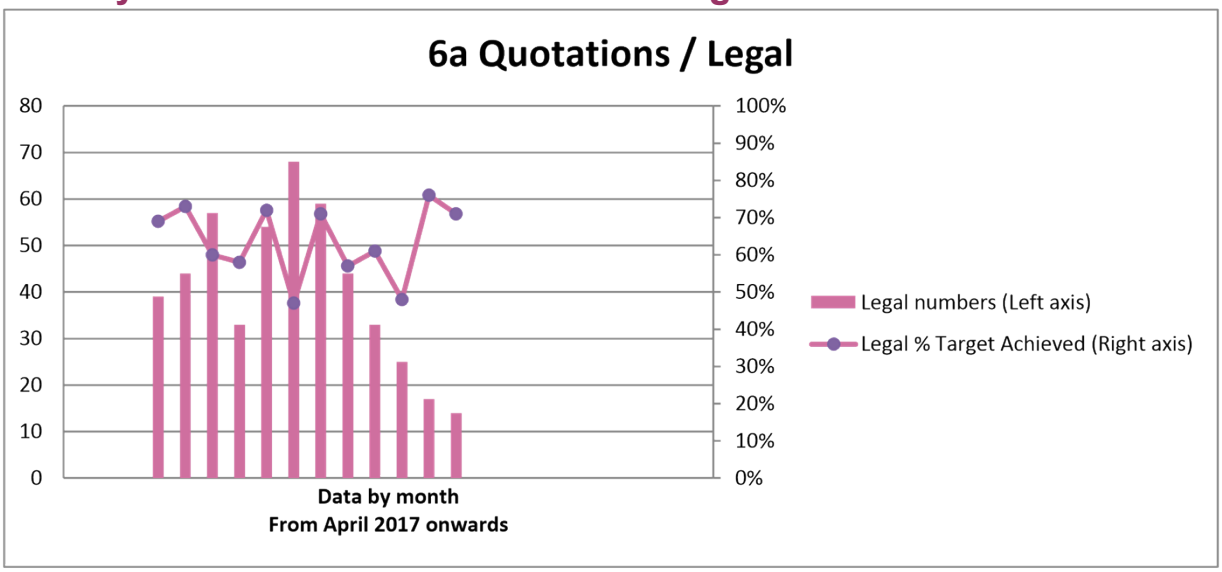

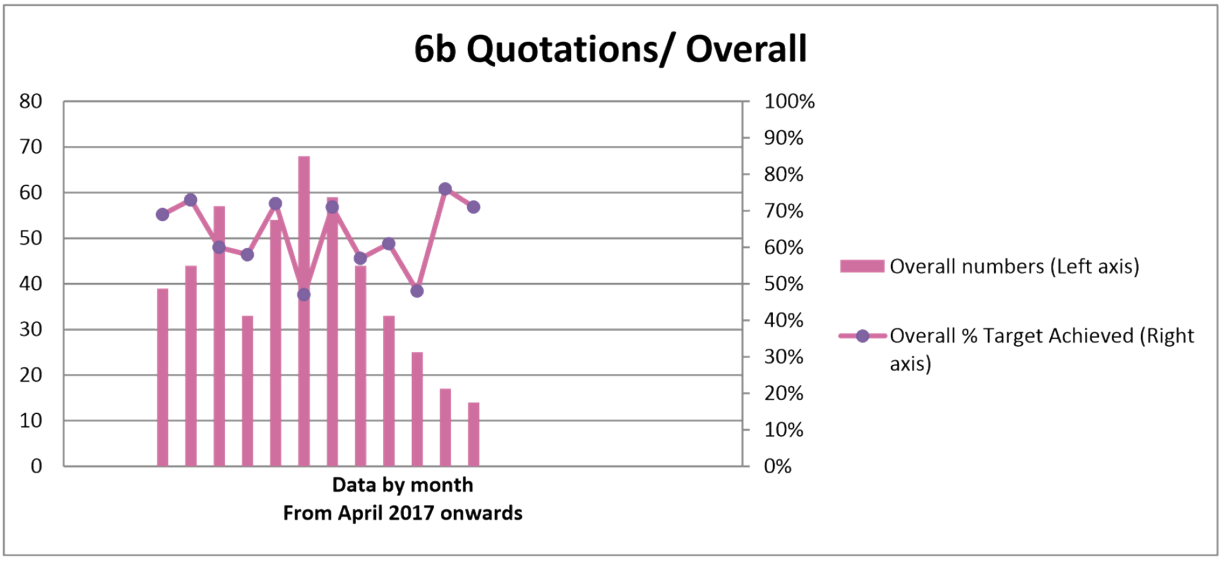

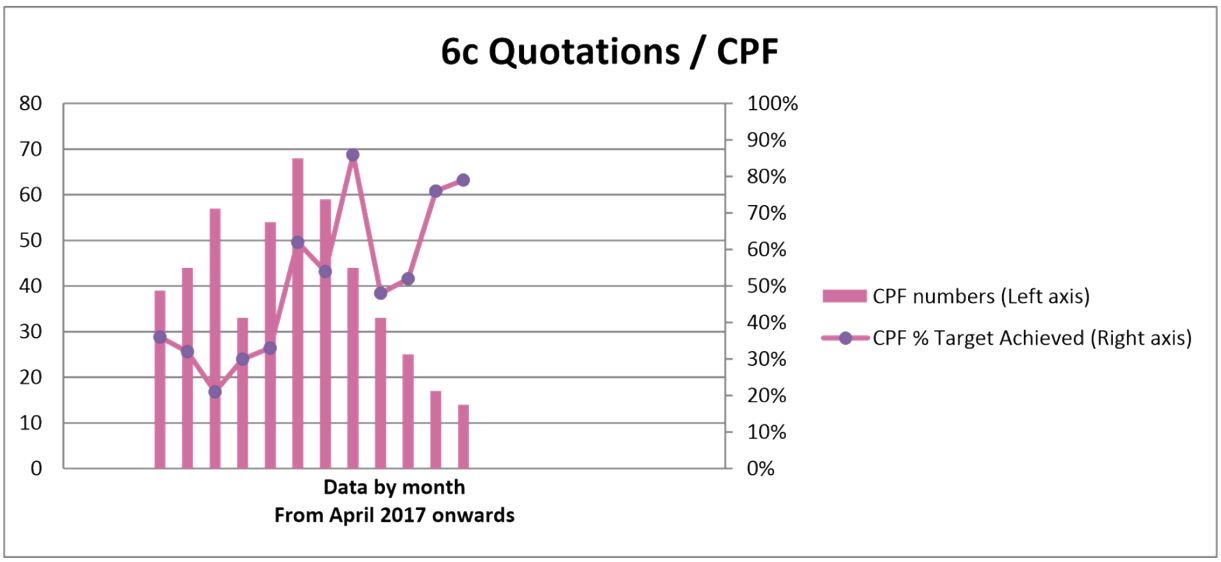
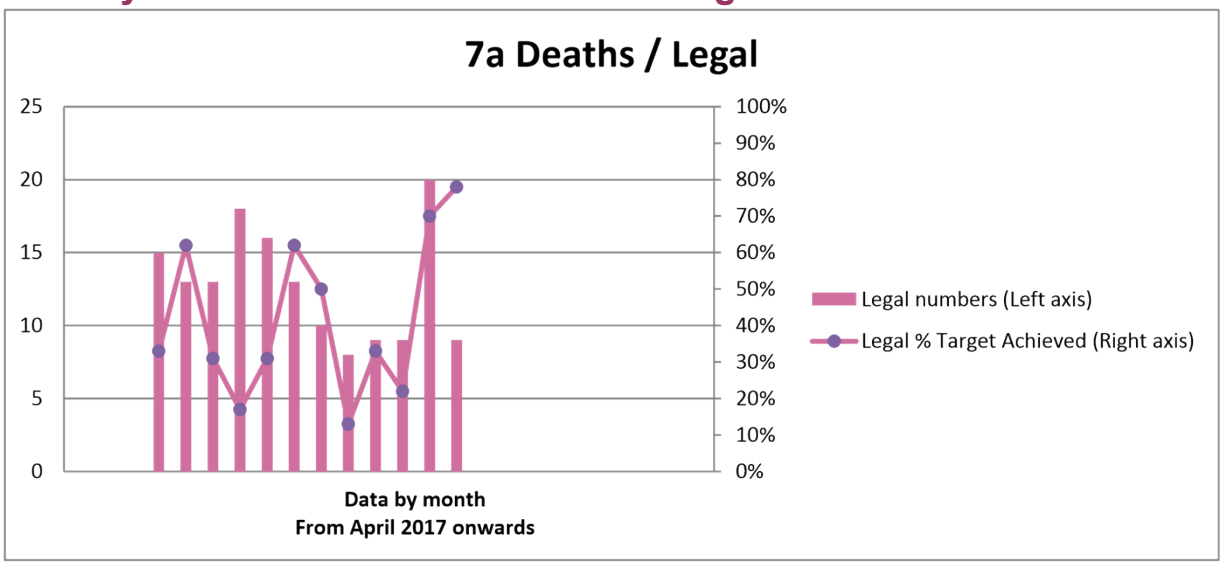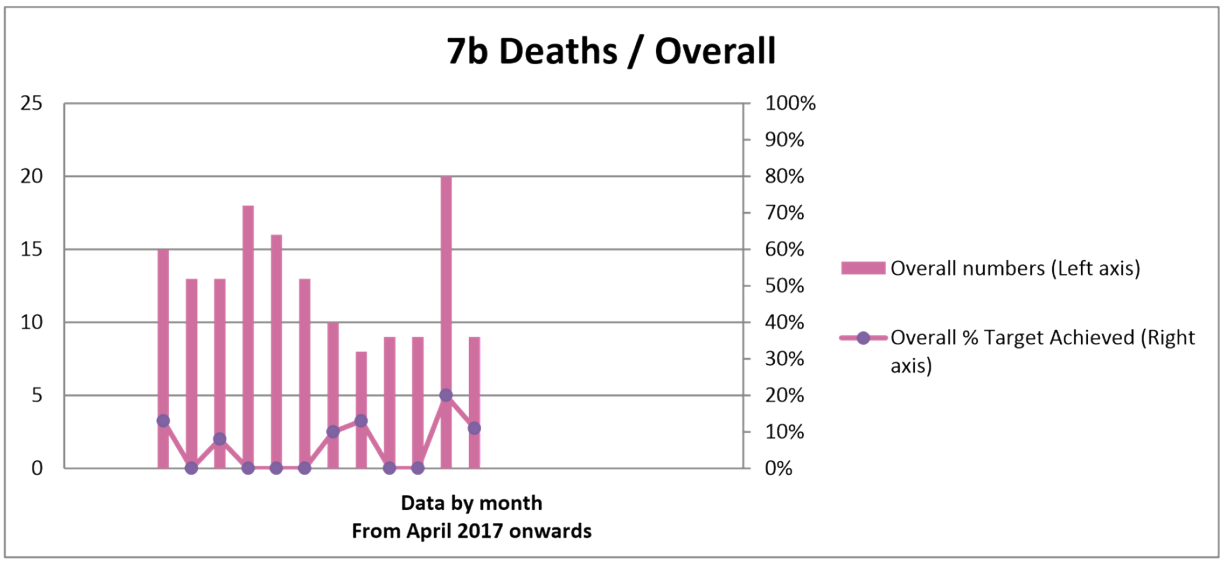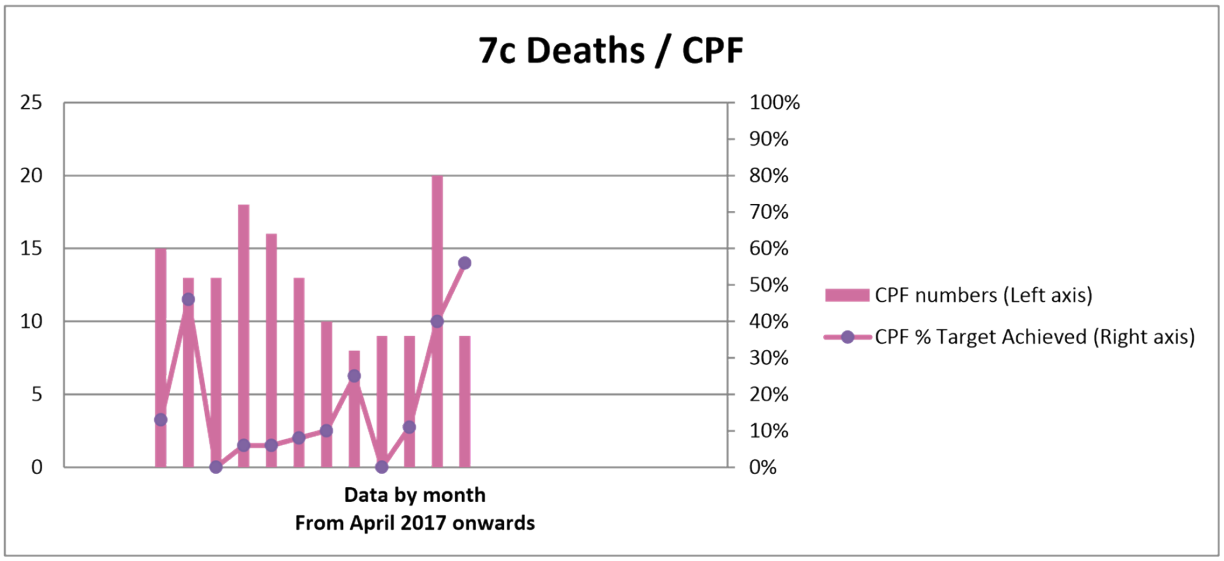
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