

## 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:

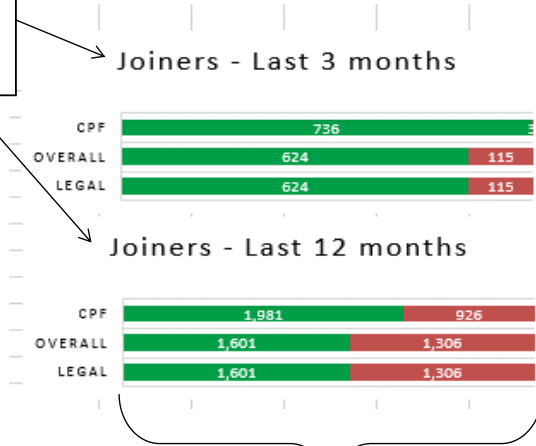
		A	B	C
	Process	Legal Requirement	Overall	CPF Administration element target
1	To send a Notification of Joining the LGPS to a scheme member	2 months from date of joining (assuming notification received from the employer), or within 1 month of receiving jobholder information where the individual is being 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 January 2024

### Joiners - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	656	-7%	-391
OVERALL	656	-7%	-391
CPF	743	0%	-391

### Joiners - Last 12 months

LEGAL	3,182	3%	-812
OVERALL	3,182	3%	-812
CPF	3,488	-1%	-812

### Leavers - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	351	-1%	-229
OVERALL	267	0%	-229
CPF	351	1%	-229

### Leavers - Last 12 months

LEGAL	2,262	0%	448
OVERALL	1,274	-9%	448
CPF	1,994	-11%	448

### Transfers In - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	21	-8%	-21
OVERALL	21	-8%	-21
CPF	25	-14%	-21

### Transfers In - Last 12 months

LEGAL	162	-34%	-31
OVERALL	162	-34%	-31
CPF	177	-24%	-31

### Transfers Out - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	7	-48%	-56
OVERALL	3	-56%	-56
CPF	2	-15%	-56

### Transfers Out - Last 12 months

LEGAL	187	-21%	-339
OVERALL	161	-30%	-339
CPF	91	-50%	-339

### Retirements - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	363	-2%	-76
OVERALL	326	-3%	-76
CPF	382	-5%	-76

### Retirements - Last 12 months

LEGAL	1,462	2%	91
OVERALL	1,339	6%	91
CPF	1,594	0%	91

### Quotations - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	262	-1%	32
OVERALL	262	-1%	32
CPF	249	23%	32

### Quotations - Last 12 months

LEGAL	917	0%	140
OVERALL	917	0%	140
CPF	804	-2%	140

### Deaths - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	35	8%	2
OVERALL	10	11%	2
CPF	38	32%	2

### Deaths - Last 12 months

LEGAL	112	-6%	-42
OVERALL	35	-1%	-42
CPF	104	-2%	-42

### Divorce Quote - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	40	0%	15
OVERALL	37	-8%	15
CPF	25	-38%	15

### Divorce Quote - Last 12 months

LEGAL	109	0%	-16
OVERALL	100	-8%	-16
CPF	94	-14%	-8

### Divorce Share - Last 3 months

Change in % completed within KPI  
Change in number completed

LEGAL	0	n/a	-1
OVERALL	0	n/a	-1
CPF	0	n/a	-1

### Divorce Share - Last 12 months

LEGAL	3	0%	-2
OVERALL	3	0%	-2
CPF	3	0%	-2

### Refund - Last 3 months

Change in % completed within KPI  
Change in number completed

LEGAL	0		
OVERALL	8	92	2%
CPF	96	4	-4%
			21
			21

### Refund - Last 12 months

LEGAL	0		
OVERALL	26	345	-2%
CPF	364	7	11%
			-79
			-79

### Retirement Lump Sum - Last 3 months

Change in % completed within KPI  
Change in number completed

LEGAL	0		
OVERALL	0		
CPF	175	8	2%
			-88

### Retirement Lump Sum - Last 12 months

LEGAL	0		
OVERALL	0		
CPF	777	38	0%
			-227

### Deferred Benefits - Last 3 months

Change in % completed within KPI  
Change in number completed

LEGAL	0		
OVERALL	170	99	10%
CPF	81	188	-19%
			7
			7

### Deferred Benefits - Last 12 months

LEGAL	0		
OVERALL	617	541	-13%
CPF	568	590	-23%
			-186
			-186

### Death Acknowledgment - Last 3 months

Change in % completed within KPI  
Change in number completed

LEGAL	0		
OVERALL	0		
CPF	76	30	-19%
			-2

### Death Acknowledgment - Last 12 months

LEGAL	0		
OVERALL	0		
CPF	330	92	-5%
			-11