

Description	Target time/date as per Partnership Agreement (working days)	Target	Actual Score Dec	Total No of completed cases	No of cases late	Actual Score Jan	Total No of completed cases	No of cases late	Commentary
<b>Pension Administration</b>									
<b>Death Benefits</b>									
<b>Write to dependant and provide relevant claim form</b>	5 days	100%	100%	17	0	86%	28	4	Increased number of death cases being received across all Funds.
Set up any dependants benefits and confirm payments due, including concluding any under or overpayments.	10 days	100%	38%	13	8	75%	12	3	
<b>Retirement Notification</b> request for retirement acknowledged, recorded and documentation sent to member	10 days	100%	89%	27	3	50%	26	13	11 of the cases that did not achieve SLA missed the target by under 5 days. Resource diverted to testing A2P and clearing A2P/PI errors.
<b>Retirements</b>									
<b>New retirement benefits processed for payment following receipt of claim forms</b>	7 days	100%	100%	4	0	73%	11	3	
<b>Deferred retirement</b> benefits processed for payment following receipt of claim forms	7 days	100%	72%	18	5	89%	18	2	
<b>Refunds of Contributions</b>									
Refund paid following receipt of claim form	10 days	100%	90%	10	1	98%	42	1	
<b>Deferred Benefits</b>									
Statements sent to member following receipt of leaver notification	20 days	100%	75%	4	1	88%	8	1	
<b>Estimates</b>									
<b>Early Retirement requests from employer</b>	10 days	100%	100%	1	0	94%	33	2	Slight dip but lots more cases processed
<b>Projections</b>									
<b>Requests from employees</b>	10 days	100%	67%	3	1	63%	8	3	
<b>New Joiners</b>									
New starters processed	30 days	100%	100%	57	0	100%	65	0	
<b>Transfers In</b>									
Quote estimate to scheme member (includes interfunds)	20 days	100%	17%	6	5	25%	8	6	
<b>Transfers In</b>									
Transfers-in payments processed	20 days	100%	75%	4	1	63%	8	3	
<b>Transfers Out</b>									
Transfers-out quotations processed (includes interfunds)	20 days	100%	80%	5	1	53%	32	15	Decreased but lots more cases processed
<b>Transfers Out</b>									
Transfers out payments processed	20 days	100%	100%	7	0	57%	7	3	
No of complaints received within the month	n/a	100%	100%	1	0	N/A	0	0	
No of complaints resolved within the month	30 days	100%	N/A	0	0	100%	1	0	
No of compliments received within the month	n/a	N/A	N/A	0	0	N/A	0	0	
<b>Monthly Pensioner Payroll</b>									
Full reconciliation of payroll and ledger report provided to Borough	Last day of month		Achieved			Achieved			
Issue of monthly payslips	3 days before pay day		Achieved			Achieved			
RTI file submitted to HMRC	3 days before pay day		Achieved			Achieved			
BACS File submitted for payment	3 days before pay day		Achieved			Achieved			
<b>Annual Exercises</b>									
<b>Annual Benefit Statements</b>									
Issued to Active members	31 August each year		Achieved			Achieved			
<b>Annual Benefit Statements</b>									
Issued to Deferred members	31 August each year		Achieved			Achieved			
<b>P60s Issued to Pensioners</b>									
	31 May each year		Achieved			Achieved			
<b>Apply Pensions Increase to Pensioners</b>									
	April each year		Achieved			Achieved			
<b>Pensioners Newsletter</b>									
	April each year		Achieved			Achieved			

<b>Helpdesk Volumes</b>
<b>Total Queries Handled</b>