

KPI Report - Hammersmith and Fulham Pension Fund
January - April 2021

Description	Target time/date as per Partnership Agreement (working days)	Target	Actual Score Jan	Total No of completed cases	No of cases late	Actual Score Feb	Total No of completed cases	No of cases late	Actual Score March	Total No of completed cases	No of cases late	Actual Score April	Total No of completed cases	No of cases late
Pension Administration														
Death Benefits														
Write to dependant and provide relevant claim form	5 days	100%	86%	28	4	70%	23	7	100%	22	0	100%	9	0
Set up any dependants benefits and confirm payments due, including concluding any under or overpayments.	10 days	100%	73%	11	3	65%	23	8	62%	21	8	40%	25	15
Retirement Notification														
request for retirement acknowledged, recorded and documentation sent to member	10 days	100%	50%	26	13	70%	60	18	48%	50	26	73%	44	12
Retirements														
New retirement benefits processed for payment following receipt of claim forms	7 days	100%	73%	11	3	50%	6	3	73%	15	4	100%	22	0
Deferred retirement benefits processed for payment following receipt of claim forms	7 days	100%	89%	18	2	100%	14	0	92%	24	2	87%	23	3
Refunds of Contributions														
Refund paid following receipt of claim form	10 days	100%	98%	42	1	85%	20	3	92%	59	5	90%	21	2
Deferred Benefits														
Statements sent to member following receipt of leaver notification	20 days	100%	88%	8	1	46%	13	7	53%	15	7	42%	24	14
Estimates														
Early Retirement requests from employer	10 days	100%	94%	33	2	63%	96	36	63%	24	9	100%	12	0
Projections														
Requests from employees	10 days	100%	63%	8	3	33%	3	2	100%	3	0	100%	2	0
New Joiners														
New starters processed	30 days	100%	#DIV/0!			100%	33	0	100%	106	0	100%	44	0
Transfers In														
Quote estimate to scheme member (includes interfunds)	20 days	100%	25%	8	6	50%	10	5	25%	16	12	57%	37	16
Transfers In														
Transfers-in payments processed	20 days	100%	63%	8	3	54%	13	6	58%	19	8	67%	18	6
Transfers Out														
Transfers-out quotations processed (includes interfunds)	20 days	100%	53%	32	15	59%	17	7	56%	16	7	80%	25	5
Transfers Out														
Transfers out payments processed	20 days	100%	57%	7	3	50%	10	5	77%	13	3	78%	9	2
No of complaints received within the month	n/a	100%	N/a	0		N/a	1		N/a	1		N/a	0	
No of complaints resolved within the month	30 days	100%	N/a	0		100%	1	0	100%	1	0	N/a	0	
No of compliments received within the month	n/a	N/a	N/a	0		N/a	1		N/a	3		N/a	1	
Monthly Pensioner Payroll														
Full reconciliation of payroll and ledger report provided to Borough	Last day of month		Achieved			Achieved			Achieved			Achieved		
Issue of monthly payslips	3 days before pay day		Achieved			Achieved			Achieved			Achieved		
RTI file submitted to HMRC	3 days before pay day		Achieved			Achieved			Achieved			Achieved		
BACS File submitted for payment	3 days before pay day		Achieved			Achieved			Achieved			Achieved		
Annual Exercises														
Annual Benefit Statements														
Issued to Active members	31 August each year		Achieved			Achieved			Achieved			Achieved		
Annual Benefit Statements														
Issued to Deferred members	31 August each year		Achieved			Achieved			Achieved			Achieved		
P60s Issued to Pensioners														
31 May each year			Achieved			Achieved			Achieved			Achieved		
Apply Pensions Increase to Pensioners														
April each year			Achieved			Achieved			Achieved			Achieved		
Pensioners Newsletter														
April each year			Achieved			Achieved			Achieved			Achieved		

Helpdesk Volumes	
Total Queries Handled	First Point Fix