

KPI Report - Hammersmith and Fulham Pension Fund
January - May 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	Actual Score May	Total No of completed cases	No of cases late	Commentary
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	100%	13	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	40%	15	9	8 cases that missed the target SLA are related to balance of payment cases, the average day for completion was 37 days, the average figure was skewed because of one overpayment case relating to a death that had a coroner enquiry (185 days for overpayment to be paid from estate). There were 5 cases that missed the SLA target related to setting up survivor pensions, however, all were set up within time for the next available payroll. The final 2 cases that missed the SLA target were related to payment of a death grant, one case missed the SLA target by 1 day and the other by 2 days.
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	96%	55	2	Average number of days over SLA = 24. Performance improved from previous month.
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	91%	11	1	
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	94%	16	1	Average number of days over SLA = 11. 1 case was a retirement backdated to August 2012 so more complex with arrears and interest to calculate. This case was 1 day over the SLA. 1 case member didn't return documents until 2 days before due date (even though we sent the quote 2 months in advance of the retirement), this case was 5 days over SLA. Final case over SLA the member didn't return forms until after due date (even though we quoted 2 months in advance of retirement), this case was 6 days over SLA. All retirement cases are processed for the next available pay run after receiving all necessary forms etc.
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	94%	50	3	Average number of days over SLA = 15.
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	81%	63	12	Average number of days over SLA = 125. Clearing through backlog from when TPR didn't categorise Deferred Benefits as a priority.
Estimates																		
Early Retirement requests from employer	10 days	100%	94%	33	2	63%	96	36	63%	24	9	100%	12	0	88%	8	1	
Projections																		
Requests from employees	10 days	100%	63%	8	3	23%	3	2	100%	3	0	100%	2	0	100%	2	0	
New Joiners																		
New starters processed	30 days	100%				100%	33	0	100%	106	0	100%	44	0	100%	10	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	74%	23	6	Average number of days over SLA = 101. Clearing through backlog from when TPR didn't categorise Transfers as a priority. Performance improved from previous month.
Transfers In																		
Transfers-in payments processed	20 days	100%	61%	8	3	54%	13	6	58%	19	8	67%	18	6	56%	16	7	Average number of days over SLA = 37. Clearing through backlog from when TPR didn't categorise Transfers as a priority. Performance improved from previous month.
Transfers Out																		
Transfers-out quotations processed (includes interfunds)	20 days	100%	53%	32	15	59%	17	7	58%	16	7	80%	25	5	87%	23	3	Average number of days over SLA = 59. Clearing through backlog from when TPR didn't categorise Transfers as a priority. Performance improved from previous month.
Transfers Out																		
Transfers out payments processed	20 days	100%	57%	7	3	50%	10	5	77%	13	3	78%	9	2	100%	8	0	Average number of days over SLA = 90. Clearing through backlog from when TPR didn't categorise Transfers as a priority. Performance improved from previous month.
No of complaints received within the month	n/a	100%	N/a	0		N/a	1		N/a	1		N/a	0		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		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		N/a	0		Unable to allocate compliments received to a specific fund
Monthly Pensioner Payroll																		
Full reconciliation of payroll and ledger report provided to Borough	Last day of month					Achieved			Achieved			Achieved						
Issue of monthly payslips	3 days before pay day					Achieved			Achieved			Achieved						
RTI file submitted to HMRC	3 days before pay day					Achieved			Achieved			Achieved						
BACS File submitted for payment	3 days before pay day					Achieved			Achieved			Achieved						
Annual Exercises																		
Annual Benefit Statements Issued to Active members	31 August each year					Achieved			Achieved			Achieved						
Annual Benefit Statements Issued to Deferred members	31 August each year					Achieved			Achieved			Achieved						
P60s Issued to Pensioners	31 May each year					Achieved			Achieved			Achieved						
Apply Pensions Increase to Pensioners	April each year					Achieved			Achieved			Achieved						
Pensioners Newsletter	April each year					Achieved			Achieved			Achieved						

Helpdesk Volumes	
Total Queries Handled	First Point Fix