

## 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 July 2023

### Joiners - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	819	6%	160
OVERALL	819	6%	160
CPF	898	3%	160

### Joiners - Last 12 months

LEGAL	3,493	-2%	-80
OVERALL	3,493	-2%	-80
CPF	4,037	-1%	-80

### Leavers - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	465	0%	-400
OVERALL	261	21%	-400
CPF	463	30%	-400

### Leavers - Last 12 months

LEGAL	2,443	0%	440
OVERALL	1,282	-6%	440
CPF	2,182	-9%	440

### Transfers In - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	24	-41%	-40
OVERALL	24	-41%	-40
CPF	34	-17%	-40

### Transfers In - Last 12 months

LEGAL	247	-10%	-7
OVERALL	247	-10%	-7
CPF	233	-8%	-7

### Transfers Out - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	18	-52%	-63
OVERALL	9	-70%	-63
CPF	3	-58%	-63

### Transfers Out - Last 12 months

LEGAL	404	-4%	-83
OVERALL	385	-6%	-83
CPF	320	-11%	-83

### Retirements - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	378	4%	91
OVERALL	348	3%	91
CPF	410	-1%	91

### Retirements - Last 12 months

LEGAL	1,353	1%	-45
OVERALL	1,217	5%	-45
CPF	1,502	4%	-45

### Quotations - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	203	1%	-19
OVERALL	203	1%	-19
CPF	187	1%	-19

### Quotations - Last 12 months

LEGAL	807	-1%	3
OVERALL	807	-1%	3
CPF	714	-2%	3

### Deaths - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	30	15%	12
OVERALL	12	2%	12
CPF	24	-5%	12

### Deaths - Last 12 months

LEGAL	113	-14%	-51
OVERALL	44	-4%	-51
CPF	108	-7%	-51

### Divorce Quote - Last 3 months

		Change in % completed within KPI	Change in number completed
LEGAL	32	0%	20
OVERALL	26	-19%	20
CPF	32	0%	20

### Divorce Quote - Last 12 months

LEGAL	107	1%	-3
OVERALL	101	-5%	-3
CPF	102	4%	-5

### Divorce Share - Last 3 months

Change in % completed within KPI  
Change in number completed



0% 0  
0% 0  
0% 0

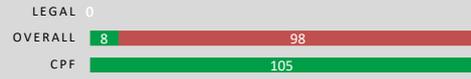
### Divorce Share - Last 12 months



0% -4  
29% -4  
0% -4

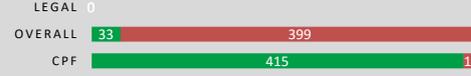
### Refund - Last 3 months

Change in % completed within KPI  
Change in number completed



2% 20  
1% 20

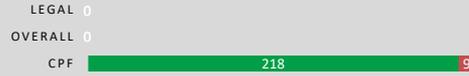
### Refund - Last 12 months



-3% 53  
14% 53

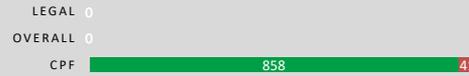
### Retirement Lump Sum - Last 3 months

Change in % completed within KPI  
Change in number completed



-1% 93

### Retirement Lump Sum - Last 12 months



0% -152

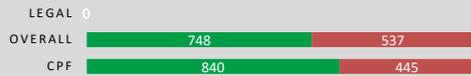
### Deferred Benefits - Last 3 months

Change in % completed within KPI  
Change in number completed



5% 143  
-6% 143

### Deferred Benefits - Last 12 months



2% -277  
12% -277

### Death Acknowledgment - Last 3 months

Change in % completed within KPI  
Change in number completed



11% -4

### Death Acknowledgment - Last 12 months



-2% -44