West Midlands Pension Fund - Key Performance Indicators (KPIs)



	Operations - Benefit Operation	S Processes							
1					21/22 Q1	21/22 Q2	21/22 Q2	21/22 Q3	21/2 Q3
	KPI Summary	KPI Description	Frequency	KPI Target	% Hit	% Hit	Trend	% Hit	Tren
	Refund Notification	Notify member of Refund within 10 days of receiving required information	Monthly	90%	94.77%	94.05%	•	94.94%	1
	Refund Payment	Refund payments processed within 5 days of receiving required information	Monthly	90%	98.88%	97.91%	•	97.65%	4
	Retirement Quote	Notification of Estimated Benefits within 15 days of retirement date	Monthly	90%	98.89%	99.25%	1	99.66%	1
	IRetirement Notification	Notification of the actual benefits within 5 days of receiving member option form (Retirement Notification)	Monthly	90%	66.73%	85.71%	1	90.98%	n n
		Payment of lump sum and creation of payroll record within 5 days of	Monthly	90%	98.44%	98.35%	J	99.49%	4
	•	receiving election form (Retirement) Issue quote letter within 30 days of the members eligible payment date	Monthly	90%	77.30%	64.58%	J.	91.83%	
	·	or receipt of request from member Notification of the actual benefits within 5 days of receiving member	·				•		1
	IDeterred Retirement Notitication	option form (Deferred Retirement Notification)	Monthly	90%	94.27%	96.49%	1	95.15%	V
	Deferred Retirement Payment	Payment of lump sum and creation of payroll record within 5 days of receiving election form (Deferred Retirement)	Monthly	90%	92.21%	94.80%	1	94.31%	1
	Transfer In Quote	Transfer in quotations processed within 10 days of receiving all the required information	Monthly	90%	98.10%	93.59%	•	96.49%	1
	Transfer In Payment	Transfer notification of transferred in membership to be notified to the scheme member within 10 days of receiving payment	Monthly	90%	94.92%	94.25%	1	87.72%	J
	Transfer Out Quote	Transfer out quotations processed within 20 days of receiving required	Monthly	90%	98.30%	100.00%	1	99.53%	J
		Information Transfer out payments processed within 20 days of receiving required	·						
	Transfer Out Payment	information	Monthly	90%	92.73%	95.24%	T	98.18%	1
	Deaths Acknowledgement	Acknowledgement of a death within 5 days of receiving the notification	Monthly	90%	96.60%	97.95%	1	88.53%	N
ŀ	Deaths Notification of Benefits Payable	Notification of benefits payable to dependents will be issued within 5 days of receiving the required information	Monthly	90%	94.24%	92.68%	•	95.49%	1
	Deaths Payment	Payment of death lump sum will be made within 10 days of receipt of all the required information	Monthly	90%	100.00%	97.97%	•	100.00%	1
	Pension Services - Customer Sa								
	r chision services - customer sa				21/22 Q1	21/22 Q2	21/22 Q2	21/22 Q3	21, 0
	KPI Summary Customer Satisfaction	KPI Description		KPI Target	% Hit	% Hit	Trend	% Hit	Tre
	Customer Satisfaction Pension Services - Complaints N	Customer satisfaction Monitoring	Quarterly	90%	85.23%	81.00%	₩	84.70%	9
	Pension Services - Complaints in	vionitoring			21/22	21/22	21/22	21/22	21,
	KPI Summary	KPI Description	Fraguancy	KPI Target	Q1 % Hit	Q2 % Hit	Q2 Trend	Q3 % Hit	C Tre
	Member Complaints	All member complaints to be responded to within 20 working days of	Frequency Monthly	100%	98.15%	98.73%	1rend	84.38%	J
	·	receipt All employer complaints to be responded to within 20 working days of							
		receipt	Monthly	100%	100.00%	100.00%		100.00%	
	Pension Services - Complaints N	vionitoring			21/22	21/22	21/22		
	KPI Summary	KPI Description	Frequency	KPI Target	Q1	Q2	Q3		
	Member Complaints less than 1%	No of member complaints to be less than 1% of total membership	Monthly	<1%	✓	<	4		
	Employer Complaints less than 1%	No of employer complaints to be less than 1% of total employer membership	Monthly	<1%	✓	<	✓		
	Pension Services - Service Calls				21/22 Q1	21/22 Q2	21/22 Q2	21/22 Q3	21, Q
	KPI Summary	KPI Description	Frequency	KPI Target	% Hit	% Hit	Trend	% Hit	Tre
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	Customer Services Calls	Call answer rate of the customer helpline	Monthly	85%	82.93%	80.63%	•	86.29%	1
	Employer Services Calls	Call answer rate of the employer helpline					_		1
		Call answer rate of the employer helpline	Monthly	85%	82.93% 96.43%	80.63% 94.33%	4	86.29%	1
	Employer Services Calls	Call answer rate of the employer helpline	Monthly	85% 85% KPI Target	82.93%	80.63%	•	86.29%	1
	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations	Monthly Monthly	85% 85%	82.93% 96.43% 21/22	80.63% 94.33% 21/22	21/22	86.29%	1
	Employer Services Calls Pension Services - Web Portal R KPI Summary	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations	Monthly Monthly Frequency	85% 85% KPI Target 3000 increase	82.93% 96.43% 21/22 Q1 2875	80.63% 94.33% 21/22 Q2 2405	21/22 Q3 2145	86.29% 95.36%	9
	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations	Monthly Monthly Frequency	85% 85% KPI Target 3000 increase	82.93% 96.43% 21/22 Q1	80.63% 94.33% 21/22 Q2	21/22 Q3	86.29%	21,
	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations Operations - Web Portal Availa KPI Summary	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations bility KPI Description	Monthly Monthly Frequency Monthly Frequency	85% KPI Target 3000 increase per quarter KPI Target	82.93% 96.43% 21/22 Q1 2875 21/22 Q1 %	80.63% 94.33% 21/22 Q2 2405 21/22 Q2 %	21/22 Q3 2145 21/22 Q2 Trend	86.29% 95.36% 21/22 Q3 %	21, C
	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations Operations - Web Portal Availa KPI Summary Web Portal Availability	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations bility KPI Description Pensions Portal to be available 95% of the time (based on working hours as monitored)	Monthly Monthly Frequency Monthly	85% 85% KPI Target 3000 increase per quarter	82.93% 96.43% 21/22 Q1 2875	80.63% 94.33% 21/22 Q2 2405 21/22 Q2	21/22 Q3 2145 21/22 Q2	86.29% 95.36% 21/22 Q3	21, C
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	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations Operations - Web Portal Availa KPI Summary Web Portal Availability Employer Portal Availability Governance - Effective Decision KPI Summary	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations bility KPI Description Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored) Making Making	Monthly Monthly Frequency Monthly Frequency Monthly Monthly	85% 85% KPI Target 3000 increase per quarter KPI Target 95% 95%	82.93% 96.43% 21/22 Q1 2875 21/22 Q1 % 98.53% 99.86%	80.63% 94.33% 21/22 Q2 2405 21/22 Q2 % 97.46%	21/22 Q3 2145 21/22 Q2 Trend	21/22 Q3 %	21, C Tre
	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations Operations - Web Portal Availa KPI Summary Web Portal Availability Employer Portal Availability Governance - Effective Decision KPI Summary Pensions Committee Training	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations bility KPI Description Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored) Making KPI Description	Monthly Monthly Frequency Monthly Monthly Frequency Monthly Frequency Biannually	85% 85% KPI Target 3000 increase per quarter KPI Target 95% 95%	82.93% 96.43% 21/22 Q1 2875 21/22 Q1 % 98.53% 99.86% 21/22 Half Year	80.63% 94.33% 21/22 Q2 2405 21/22 Q2 % 97.46%	21/22 Q3 2145 21/22 Q2 Trend	21/22 Q3 %	21, C Tre
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	Employer Services Calls Pension Services - Web Portal F KPI Summary Web Portal Registrations Operations - Web Portal Availa KPI Summary Web Portal Availability Employer Portal Availability Governance - Effective Decision KPI Summary Pensions Committee Training Pensions Board Training Total PC/PB Training Governance - Effective Decision KPI Summary Pensions Board Attendance Pensions Committee Attendance Total PC/PB Attendance Governance - Statutory Respon	Call answer rate of the employer helpline Registrations KPI Description Web Portal Registrations bility KPI Description Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored) Making KPI Description Training hours of Pensions Committee Training hours of Pensions Board Total training hours of Pensions Committee and Board Making KPI Description Attendance rate of Pensions Board Attendance rate of Pensions Committee Total attendance rate of Pensions Committee Total attendance rate of Pensions Committee	Monthly Monthly Frequency Monthly Monthly Monthly Monthly Monthly Biannually Biannually Biannually Biannually Biannually Biannually Biannually	KPI Target 3000 increase per quarter KPI Target 95% 95% KPI Target 22 hours pp 22 hours pp 22 hours pp 4 per year 4 per year 4 per year 4 per year	82.93% 96.43% 21/22 Q1 2875 21/22 Q1 % 98.53% 99.86% 21/22 Half Year 100.00% 100.00% 21/22 Half Year 79.17% 79.49% 79.37%	80.63% 94.33% 21/22 Q2 % 97.46% 100.00%	21/22 Q2 Trend 10/20 11/22 Q2 21/22 Q2 21/22 Q2	21/22 Q3 % 99.60% 100.00%	21, C Tre
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DBS produced for 100% of deferred member records

99.00%

Annually

100%