Appendix C

West Midlands Pension Fund - Key Performance Indicators (KPIs)

West Midlands Pension Fund

Benefit Operations Processes

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Refund Notification	Notify member of Refund within 10 days of receiving required information	Monthly	R < 80% A < 90% G >= 90%	94%	95%	95%
Refund Payment	Refund payments processed within 5 days of receiving required information	Monthly	R < 80% A < 90% G >= 90%	98%	96%	97%
Transfer In Payment	Transfer notification of transferred in membership to be notified to the scheme member within 10 days of receiving payment	Monthly	R < 80% A < 90% G >= 90%	100%	93%	96%
Transfer In Quote	Transfer in quotations processed within 10 days of receiving all the required information	Monthly	R < 80% A < 90% G >= 90%	99%	100%	99%
Transfer Out Payment	Transfer out payments processed within 20 days of receiving required information	Monthly	R < 80% A < 90% G >= 90%	100%	100%	100%
Transfer Out Quote	Transfer out quotations processed within 20 days of receiving required information	Monthly	R < 80% A < 90% G >= 90%	100%	100%	100%
Retirement Notification	Notification of the actual benefits within 5 days of receiving member option form (Retirement Notification)	Monthly	R < 80% A < 90% G >= 90%	89%	89%	89%
Retirement Payment	Payment of lump sum and creation of payroll record within 5 days of receiving election form (Retirement)	Monthly	R < 80% A < 90% G >= 90%	97%	96%	96%
Retirement Quote	Notification of Estimated Benefits within 15 days of retirement date	Monthly	R < 80% A < 90% G >= 90%	98%	99%	99%
Deferred Retirement Notification	Notification of the actual benefits within 5 days of receiving member option form (Deferred Retirement Notification)	Monthly	R < 80% A < 90% G >= 90%	98%	94%	95%
Deferred Retirement Payment	Payment of lump sum and creation of payroll record within 5 days of receiving election form (Deferred Retirement)	Monthly	R < 80% A < 90% G >= 90%	94%	89%	91%
Deferred Retirement Quote	Issue quote letter within 30 days of the members eligible payment date or receipt of request from member	Monthly	R < 80% A < 90% G >= 90%	92%	88%	90%
Deaths Acknowledgement	Acknowledgement of a death within 5 days of receiving the notification	Monthly	R < 80% A < 90% G >= 90%	97%	98%	98%
Deaths Notification of Benefits Payable	Notification of benefits payable to dependents will be issued within 5 days of receiving the required information	Monthly	R < 80% A < 90% G >= 90%	99%	96%	98%
Deaths Payment	Payment of death lump sum will be made within 10 days of receipt of all the required information	Monthly	R < 80% A < 90% G >= 90%	94%	99%	96%

Customer Engagement and Communication

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Customer Services Calls	In accordance with PAS >85% of calls to received to the Customer helpline to be answered	Monthly	R < 85% G >= 85%	75%	85%	80%
Employer Services Calls	In accordance with PAS>85% of calls to received t o the Customer helpline to be answered	Monthly	R < 85% G >= 85%	97%	97%	97%

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Customer Satisfaction	Customer satisfaction - feedback from events and interaction with members	Quarterly	R < 80% A < 90% G >= 90%	99%	89%	94%

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Member Complaints	In accordance with the PAS all member complaints to be responded to within 20 working days of receipt	Monthly	R < 80% A < 90% G >= 90%	91%	78%	86%
Employer Complaints	In accordance with the PAS all employer complaints to be responded to within 20 working days of receipt	Monthly	R < 80% A < 90% G >= 90%	N/A	100%	100%

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Employer Portal Availability	Employer Portal to be available 95% of the time (based on working hours as monitored)	Monthly	R < 95% G >= 95%	100%	100%	100%
Web Portal Availability	Pensions Portal to be available 95% of the time (based on working hours as monitored)	Monthly	R < 85% G >= 85%	100%	100%	100%

Governance and Risk

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Statutory Timeliness - Data Breaches	All Fund reports to be submitted in line with service standard set to CWC	Monthly	R < 80% A < 90% G >= 90%	100%	80%	89%
Statutory Timeliness - FOI's	All Fund responses to be submitted in line with service standard set to CWC	Monthly	R < 80% A < 90% G >= 90%	100%	100%	100%
Statutory Timeliness - SAR's	All Fund responses to be submitted in line with service standard set to CWC	Monthly	R < 80% A < 90% G >= 90%	100%	100%	100%

Data Management and Reporting

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23 Q1	22/23 Q2	22/23 Total
Common Data	Common Data	Monthly	R < 80% A < 90% G >= 90%	98%	98%	98%

KPI Summary	KPI Description	Reporting Frequency	Target Summary	22/23		
ABS	ABS produced for 100% of eligible active member records	Annually	R < 80% A < 90% G >= 90%	91%		
DBS	DBS produced for 100% of eligible deferred member records	Annually	R < 80% A < 90% G >= 90%	100%		