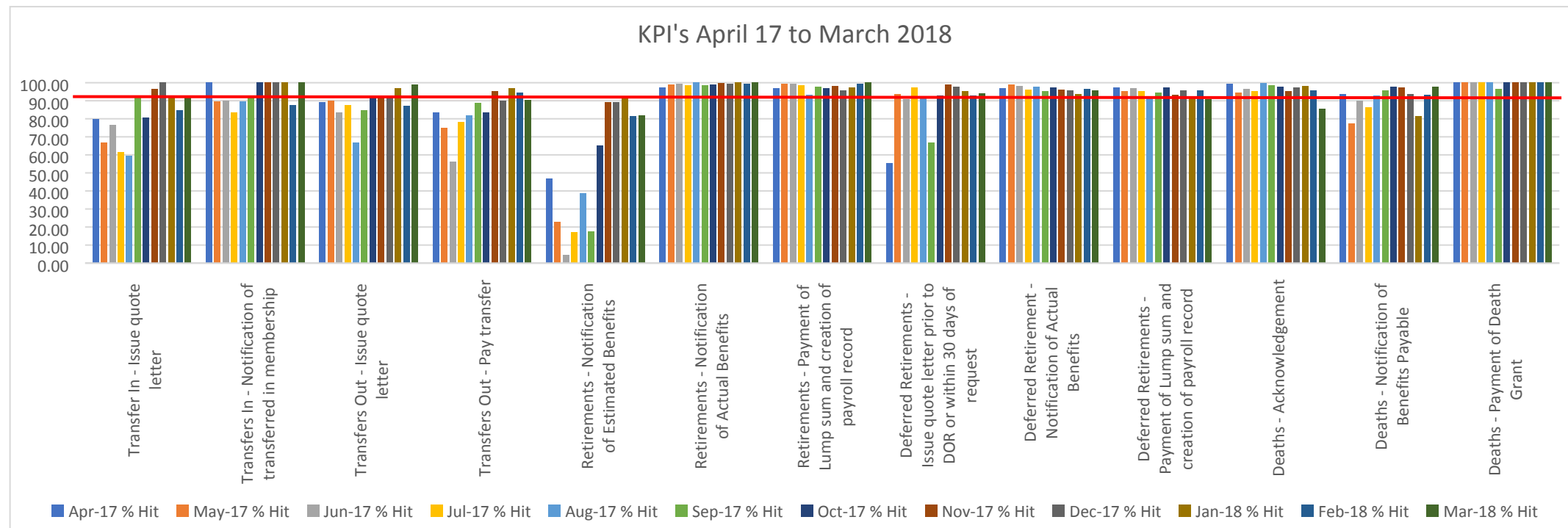


## West Midlands Pension Fund – Appendix D – Key Performance Indicators (KPIs)



Key areas to note over the previous 12 months include the following:

- Transfers In issue quote letter from April 2017 to August 2017 was at or below 80%, from September 2017 the KPI has been maintained above 80% and as at March 2018 was 92.31%.
- Transfers In notification of transferred membership has been maintained at above 80% through the previous 12 months, with 6 months of the previous 12 months achieving 100%.
- Transfers Out issue quote KPI as at March 2018 was 99.07%.
- Transfers Out pay transfer for the period April 2017 to October 2017 ranged from 56.25% to 89.06%, for the period November 2017 to March 2018 the KPI has been maintained above 90%.
- Retirements Notification of Estimated Benefits for the period April 2017 to October 2017 the KPI ranged from 4.57% to 65.2%, however since November 2017 the KPI has been maintained above 80%.
- Retirements Payment of Lump sum and creation of payroll record have been maintained through the 12 month period at above 90%.
- Deferred Retirement Notification of Actual Benefits have been maintained through the 12 month period at above 90%.
- Deferred Retirements - Payment of Lump sum and creation of payroll record have been maintained through the 12 month period at above 90%.
- Deaths acknowledgements - for the period April 2017 to March 2018 the KPI has been maintained above 90%, with March 2018 KPI reducing slightly to 85.47%.