West Midlands Pension Fund - Key Performance Indicators (KPIs)



	Operations - Benefit Operation											
					T Yr 20/21 Q1	Values 20/21 Q2	20/21 Q2	20/21 Q3	20/21 Q3	20/21 Q4	20/21 Q4	20/21
	KPI Summary Refund Notification	KPI Description Notify member of Refund within 10 days of receiving required	Frequency Monthly	KPI Tarzet 90%	% Hit 97.20%	% Hit 95.16%	Trend	% Hit 93.91%	Trend	% Hit	Trend	95.1
		information Refund payments processed within 5 days of receiving required	-				J.			94.76%	1	_
I	Refund Payment	information	Monthly	90%	99.62%	98.80%		98.66%	•	97.97%	•	98.
	Retirement Quote	Notification of Estimated Benefits within 15 days of retirement date Notification of the actual benefits within 5 days of receiving member	Monthly	90%	76.80%	90.67%	1	92.14%	1	98.91%	1	89.
	Retirement Notification	option form (Retirement Notification) Payment of lump sum and creation of payroll record within 5 days of	Monthly	90%	98.32%	99.33%	1	99.57%	1	93.99%	•	97.
	Retirement Payment	receiving election form (Retirement)	Monthly	90%	96.27%	98.89%	Ŷ	98.92%	1	99.80%	1	98.
l	Deferred Retirement Quote	Issue quote letter within 30 days of the members eligible payment date or receipt of request from member Notification of the actual benefits within 5 days of receiving member	Monthly	90%	91.86%	89.23%		80.05%	•	90.64%	T.	87.
	Deferred Retirement Notification	option form (Deferred Retirement Notification)	Monthly	90%	96.61%	96.20%		97.58%	T.	95.84%		96.
	Deferred Retirement Payment	Payment of lump sum and creation of payroll record within 5 days of receiving election form (Deferred Retirement)	Monthly	90%	92.32%	94.59%	Ŷ	95.16%	1	95.20%	•	94.
I	Transfer In Quote	Transfer in quotations processed within 10 days of receiving all the required information	Monthly	90%	100.00%	95.60%		94.20%		100.00%	T	97.
	Transfer In Payment	Transfer notification of transferred in membership to be notified to the scheme member within 10 days of receiving payment	Monthly	90%	100.00%	95.52%		94.92%		100.00%	T	97.
	Transfer Out Quote	Transfer out quotations processed within 20 days of receiving required information	Monthly	90%	100.00%	99.59%		99.39%		98.26%		99.
	Transfer Out Payment	Transfer out payments processed within 20 days of receiving required information	Monthly	90%	100.00%	96.30%		91.43%		97.96%	T	96
	Deaths Acknowledgement	Acknowledgement of a death within 5 days of receiving the notification	Monthly	90%	98.32%	98.17%		99.24%	1	92.64%		96
	Deaths Notification of Benefits Payable	Notification of benefits payable to dependents will be issued within 5 days of receiving the required information	Monthly	90%	94.70%	91.28%		90.18%		96.08%	Ŷ	93
	Deaths Payment	Payment of death lump sum will be made within 10 days of receipt of all the required information	Monthly	90%	100.00%	100.00%	→	99.21%		100.00%	T	99
7	Pension Services - Service Calls											
ľ					T Yr 20/21	Values 20/21	20/21	20/21	20/21	20/21	20/21	20/2
	KPI Summary	KPI Description	Frequency	KPI Target	Q1 % Hit	Q2 % Hit	Q2 Trend	Q3 % Hit	Q3 Trend	Q4 % Hit	Q4 Trend	
I	Customer Services Calls	Calls received to the customer helpline to be answered	Monthly	85%	78.66%	86.57%	Ŷ	87.59%		79.07%	+	8
	Employer Services Calls	Calls received to the employer helpline to be answered	Monthly	85%	96.47%	95.97%		95.64%		96.45%	T	9
	Pension Services - Customer Sa	atisfaction										
ľ					T Yr 20/21	Values 20/21	20/21	20/21	20/21	20/21	20/21	20/
	VPI Summan	KRI Dereciption	Francisco	KRI Tarnet	Q1 % Hit	Q2 % Hit	Q2 Trend	Q3 % Hit	Q3 Trend	Q4 % Hit	Q4 Trend	
ľ	Customer Satisfaction	Customer satisfaction	Quarterly	90%	100.00%	95.42%	V	88.80%	•	90.00%	T	9:
										Not yet received		
	Pension Services - Web Portal	Registrations		1	T Yr	Values				Tecented		
					20/21 Q1	Values 20/21 Q2	20/21 Q2	20/21 Q3	20/21 Q3	20/21 Q4	20/21 Q4	20,
	KPI Summary Web Portal Registrations	KPI Description Web Portal Resistrations	Frequency	KPI Target	Regs	Regs	% inc	Regs	% inc	Regs	% inc	
	Web Portal Registrations	Web Portal Registrations	Monthly	90000	97339	101834	4.62%	104901	3.01%	108133	3.08%	1
	Operations - Web Portal Availa	ability		1	T Yr	Valuer						
						Values 20/21	20/21	20/21	20/21			20
	KPI Summary	KPI Description	Frequency	KPI Target	01 %	Q2 %	Q2 Trend	Q3 %	Q3 Trend	Q4 %	Q4 Trend	
	Web Portal Availability	Pensions Portal to be available 95% of the time (based on working hours as monitored)	Monthly	95%	98.80%	100.00%	Ŷ	99.91%		98.98%	•	9
	Employer Portal Availability	Employer Portal to be available 95% of the time (based on working hours as monitored)	Monthly	95%	98.56%	99.79%	•	99.87%	•	99.19%	•	9
Pension Services - Complaints Monitoring												
1				1	T Yr 20/21	Values 20/21	20/21	20/21	20/21	20/21	20/21	20/
			_		Q1	Q2	Q2 Trend	Q3	Q3 Trend	Q4 % Hit	Q4 Trend	207
	Member Complaints	All member complaints to be responded to within 20 working days of receipt	Monthly	100%	97.67%	97.14%	J	93.33%	J	92.86%	l rend	4
							•					
	Employer Complaints	All employer complaints to be responded to within 20 working days of	Monthly	100%	100.00%	100.00%		100.00%		N/A	•	10
		receipt	Monthly	100%	100.00%	100.00%	→	100.00%	->	N/A	¥	10
	Employer Complaints Pension Services - Complaints	receipt	Monthly	100%	T Yr	Values						10
		receipt	Monthly	100%	100.00% T Yr 20/21 Q1	100.00% Values 20/21 Q2	20/21 Q2	20/21 Q3	20/21 Q3	N/A 20/21 Q4	20/21 Q4	20/:
		receipt	Monthly	100%	T Yr 20/21	Values 20/21	20/21	20/21	20/21	20/21	20/21	
		receipt	Monthly Frequency Monthly	100% KPI Target <1%	T Yr 20/21 Q1	Values 20/21 Q2	20/21 Q2	20/21 Q3	20/21 Q3	20/21 Q4	20/21 Q4	
	Pension Services - Complaints	Precisi Monitoring	Frequency	KPI Target	T Yr 20/21 Q1 <1 %?	Values 20/21 Q2 <1 %?	20/21 Q2 Total Complaints	20/21 Q3 <1 %?	20/21 Q3 Total Complaints	20/21 Q4 <1 %?	20/21 Q4 Total Complaints	20/:
	Pension Services - Complaints KH bornary Member Complaints less than 1% Employer Complaints less than 1%	Precipit Monitoring Provide the set of the s	Frequency Monthly	KPI Target <1%	T Yr 20/21 Q1 <1 %? ✓	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/:
	Pension Services - Complaints KF Summary Member Complaints less than 1%	Precipit Monitoring Provide the set of the s	Frequency Monthly	KPI Target <1%	T Yr 20/21 Q1 <1 %? ✓	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/
	Pension Services - Complaints en Janmary Member Complaint less than 1% Employer Complaints less than 2% Governance - Effective Decisio	Precipit Monitoring Provide the set of the s	Frequency Monthly	ICPI Target <1% <1%	T Yr 20/21 Q1 <1 %? ✓	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/
	Prension Services - Complaints ent Journary Member Complaints less than 1% Employer Complaints less than 1% Governance - Effective Decisio dovernance - Effective Decisio	Territor Tip Description No of employer complaints to be less than 1% of total employer membership Making rin Description	Frequency Monthly Monthly	KPI Target <1%	TYr 20/21 Q1 <1%? ✓ ✓ TYr 20/21	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	
	Pension Services - Complaints Physion Physion Physion Physion Phy	Tection Monitoring For Description No of member complaints to be less than 1% of total membership No of membership No of employer complaints to be less than 1% of total employer membership No of membership N	Frequency Monthly Monthly Frequency Blannually	KPI Target <1% KPI Target 22 hours pp	TYr 20/21 Q1 ✓ ✓ ✓ TYr 20/21 D5.33%	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	
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	Pension Services - Complaints Phonony Phonone Complaints less than 1% Employer Complaints less than 1% Governance - Effective Decisio Phonone Committee Training Tetal PC/PB Training Governance - Effective Decisio	Perceipt Perceipt	Frequency Monthly Monthly Frequency Biannually Biannually	KPI Target <1% <1% KPI Target 22 hours pp 22 hours pp	TYr 20/21 q1 <1%? ✓ ✓ TYr 20/21 155.33% 86.81% 131.93%	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	
	Pension Services - Complaints Pension Services - Complaints Pension Services - Complaints Pension Complaints less than 1% Governance - Effective Decisio Pensions Board Training Tetal PC/PB Training Governance - Effective Decisio Governance - Effective Decisio Company	Teritorian Teritorian Terif Description No of member complaints to be less than 1% of total membership No of employer complaints to be less than 1% of total membership No of employer complaints to be less than 1% of total membership Teritoriants Teritoriants Teritoriants Tataling hours of Pensions Committee Tataling hours of Pensions Committee and Board Tetal training hours of Pensions Committee and Board Making Ter Description	Frequency Monthly Monthly Frequency Biannually Biannually Biannually	KPI Target <1% <1% 22 hours pp 22 hours pp 22 hours pp	T Yr 20/21 Q1 √ √ √ T Yr 20/21 155.33% 86.81% 131.93%	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/
	Pension Services - Complaints Phonony Phonone Complaints less than 1% Employer Complaints less than 1% Governance - Effective Decisio Phonone Committee Training Tetal PC/PB Training Governance - Effective Decisio	Perceipt Perceipt	Frequency Monthly Monthly Frequency Biannually Biannually	KPI Target <1% <1% KPI Target 22 hours pp 22 hours pp	TYr 20/21 q1 <1%? ✓ ✓ TYr 20/21 155.33% 86.81% 131.93%	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/
	Pension Services - Complaints Pension Services - Complaints Pension Services - Complaints Pension Complaints less than 1% Governance - Effective Decisio Pensions Board Training Tetal PC/PB Training Governance - Effective Decisio Governance - Effective Decisio Company	Teritorian Teritorian Terif Description No of member complaints to be less than 1% of total membership No of employer complaints to be less than 1% of total membership No of employer complaints to be less than 1% of total membership Teritoriants Teritoriants Teritoriants Tataling hours of Pensions Committee Tataling hours of Pensions Committee and Board Tetal training hours of Pensions Committee and Board Making Ter Description	Frequency Monthly Monthly Frequency Biannually Biannually Biannually	KPI Target <1% <1% 22 hours pp 22 hours pp 22 hours pp	T Yr 20/21 Q1 √ √ √ T Yr 20/21 155.33% 86.81% 131.93%	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/
	Pension Services - Complaints Phonony Phonone Complaints less than 1% Implyer Complaints less than 1% Implyer Complaints less than 1% Governance - Effective Decision Phonone Board Training Tetal PC/PB Training Governance - Effective Decision Beardsone Climite Decision Making Phonone State Attendance	Technic Complete Section Sect	Frequency Monthly Monthly Frequency Biannually Biannually Biannually Biannually	KPI Target <1% <1% XPI Target 22 hours pp 22 hours pp 22 hours pp 22 hours pp 24 hours pp 25 hours pp	T Yr 20/21 Q1 √ √ √ T Yr 20/21 155.33% 86.81% 131.93% T Yr 20/21 73.68%	Values 20/21 Q2 <1 %?	20/21 Q2 Total Comolaints 70	20/21 Q3 <1%? ✔	20/21 Q3 Total Complaints 59	20/21 Q4 <1 %? ✔	20/21 Q4 Total Complaints 27	20/
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KPI Description Main Fund - Contributions received from emplo accountancy statement

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Finance - Contributions Received

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