

KPI Performance: July - Sep 2023

Case Type	Performance standard	Tolerable performance	A % completed within SLA	B Case opening balance	C New cases received	D Cases completed	F Closing balance	E Terminated Cases	G Future Workload (days)
DEATH NOTIFICATION (tPR)	5 working days	90%	78%	2	185	139	8	34	3
SURVIVOR'S PENSIONS (tPR)	10 working days	90%	75%	23	86	61	21	35	20
DEATH BENEFITS PAYABLE (tPR)	10 working days	90%	79%	24	75	54	27	8	30
BALANCE OF PAYMENTS (tPR)	10 working days	90%	88%	59	203	183	46	8	15
RETIREMENT (COMPLETE) (tPR)	15 working days	85%	74%	288	561	356	331	42	56
ILL HEALTH RETIREMENT (COMPLETE) (tPR)	15 working days	90%	43%	4	4	3	1	1	20
REFUNDS (tPR)	20 working days	80%	98%	280	1,140	980	360	258	22
RETIREMENT (INITIAL NOTIFICATION)	15 working days	80%	77%	409	824	543	464	239	51
ILL HEALTH RETIREMENT (INITIAL)	15 working days	90%	60%	8	12	3	13	6	30
DEFERRED STATUS	40 working days	80%	64%	3,846	1,294	825	816	654	59
EMPLOYER ESTIMATE	10 working days	80%	51%	29	68	36	20	37	33
LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	89%	578	505	399	154	175	23
NON-LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	100%	133	43	36	8	8	13
LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	93%	198	278	250	100	66	24
NON-LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	100%	115	110	132	21	20	10
LGPS TRANSFER IN (ACTUAL)	20 working days	80%	85%	678	592	445	264	117	36
NON-LGPS TRANSFER IN (ACTUAL)	20 working days	80%	84%	33	58	41	23	11	34
LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	78%	185	191	144	96	38	40
NON-LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	100%	3	15	12	4	11	20
NEW STARTER	30 working days	80%			277	277			
<b>TOTAL CASE NUMBERS</b>			<b>80%</b>	<b>6,895</b>	<b>6,521</b>	<b>4,919</b>	<b>2,777</b>	<b>1,768</b>	

Summary

Performance not at optimal levels. A combination of staff absence and resources being diverted to annual allowance has contributed to lower performance than expected. Additionally, there has been 20% increase in member queries via the Customer Relationship Team which has put additional strain on the Immediate Benefits Team. There were signs in August that performance was improving with the survivor benefit KPIs reaching a 92% completion rate, a 16% increase on July. Work continues to address the inconsistencies in the performance, with a focus on the people, process and team resilience levels. Transfer cases have been a real positive this quarter, with three areas hitting a 100% completion rate. Its worth noting that some cases will be affected by the legacy project in this quarter, most noticeably in the deferred cases, with cases being segregated to create the distinction between BAU and legacy. New starter numbers appear lower this quarter due to missing data from the Surrey CC employer.

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