

KPI Performance: Sept - Dec 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%	84%	8	208	212	5	5	1
SURVIVOR'S PENSIONS (tPR)	10 working days	90%	82%	21	90	94	10	13	6
DEATH BENEFITS PAYABLE (tPR)	10 working days	90%	79%	27	65	63	25	3	24
BALANCE OF PAYMENTS (tPR)	10 working days	90%	86%	46	184	175	54	8	19
RETIREMENT (COMPLETE) (tPR)	15 working days	85%	76%	331	582	572	275	90	29
ILL HEALTH RETIREMENT (COMPLETE) (tPR)	15 working days	90%	75%	1	14	12	3	-	15
REFUNDS (tPR)	20 working days	80%	99%	360	973	1,085	171	315	9
RETIREMENT (INITIAL NOTIFICATION)	15 working days	80%	92%	464	788	898	265	187	18
ILL HEALTH RETIREMENT (INITIAL)	15 working days	90%	76%	13	23	21	9	7	26
DEFERRED STATUS	40 working days	80%	93%	816	1,023	1,020	699	213	41
EMPLOYER ESTIMATE	10 working days	80%	65%	20	77	81	9	18	7
LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	97%	154	718	633	196	242	19
NON-LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	100%	8	18	16	7	10	26
LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	98%	100	262	276	69	59	15
NON-LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	98%	21	60	55	22	19	24
LGPS TRANSFER IN (ACTUAL)	20 working days	80%	94%	264	629	600	233	141	23
NON-LGPS TRANSFER IN (ACTUAL)	20 working days	80%	97%	23	31	30	19	4	38
LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	91%	96	182	158	107	22	41
NON-LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	90%	4	28	19	10	8	32
NEW STARTER	30 working days	80%			1,376	1376			
TOTAL CASE NUMBERS			88%	2,777	7,331	7,396	2,188	1,364	

Summary

Survivor's Benefits process investigation has been completed and improvement noted in this area.

The improvement plan has significantly reduced the future workload allowing the teams to concentrate on the incoming work.

This has led to a modest improvement in the figures for Q3, with full results expected in Q4, this will be closely monitored.

LGPS & Non LGPS Transfer Out estimate cases have been affected by recent changes due to the McCloud ruling and some placed on hold.

Teams are monitoring these cases and working on those unlikely to be affected by the McCloud ruling.

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