

Isle of Wight Pension Fund Key Performance Indicators 2018/19

Last update: 03 January 2019

Statistics based on Rolling 12 Month Period

	Detail	2017/18 achieved	Target	April 2018	May 2018	June 2018	July 2018	August 2018	September 2018	October 2018	November 2018	December 2018	January 2019	February 2019	March 2019
Payment of Benefits	Set up of new pension and lump sum within 10 working days of receipt of all documents	98.23%	100	92.9% (24/26)	94.12% (16/17)	95.65% (22/23)	96.55% (28/29)	100% (17/17)	100% (21/21)	97.62% (41/42)	100% (22/22)	100% (23/23)	100% (23/23)		
Benefits Estimates Members	Estimates of benefits to Members within 20 working days.	96.9%	100	100% (24/24)	80% (12/15)	92.30% (12/13)	100% (18/18)	100% (1/1)	100% (5/5)	100% (6/6)	100% (6/6)	100% (11/11)	100% (1/1)		
Benefits Estimates Employers	Estimate of benefits to Employers within 5 working days.	96.9%	100	100% (7/7)	100% (7/7)	100% (8/8)	100% (6/6)	100% (5/5)	100% (1/1)	100% (7/7)	100% (6/6)	Nil	100% (4/4)		
Annual Benefits Statements	Produce the required standard to statutory timescale by 31 st August each year	100%	100	N/A	N/A	N/A	100% Fire Def 100% LG Def	100% Fire Act	N/A	N/A	N/A	N/A	N/A		
Transfers In Payments	Payment made within 5 working days of receipt of all documentation	Not previously reported	100	Nil	100% (1/1)	100% (2/2)	Nil	Nil	Nil	Nil	Nil	Nil	Nil		
Transfers in Quotes	Issued within 20 working days of notification and all information required to produce a quote.	Not previously reported	100	-	-	Nil	Nil	(0/0)	(0/0)	100% (2/2)	Nil	100% (1/1)	100% (1/1)		
Transfers Out Payments	Payment made within 5 working days of receipt of all documentation.	Not previously reported	100	-	100% (1/1)	100% (1/1)	100% (3/3)	100% (5/5)	0% (1/0)	100% (4/4)	100% (1/1)	Nil	Nil		

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Transfers Out Quotes	Not previously reported	100	-	-	100% (6/6)	Nil	100% (1/1)	100% (1/1)	100% (2/2)	0% (0/1)	Nil	100% (1/1)		
Deaths	Not previously reported	100	100% (10/10)	80% (8/10)	100% (14/14)	100% (7/7)	100% (5/5)	100% (8/8)	100% (5/5)	100% (4/4)	100% (1/1)	100% (16/16)		
Pensioner Payroll	100%	100	100% Completed 19.04.2018 5,115 24 – Starters 34 -Variations	100% Completed 17.05.2018 5108 30 – Starters 24 - Variations	100% Completed 19.06.2018 5137 26 – Starters 26 - Variations	100% Completed 19.07.2018 5181 51 – Starters 50 - Variations	100% Completed 17.08.2018 5194 26 – Starters 12 - Variations	100% Completed 18.09.2018 5211 15 – Starters 13 - Variations	100% Completed 18.10.2018 5229 31 – Starters 28 - Variations	100% Completed 20.11.2018 5277 44 – Starters 45 - Variations	100% Completed 11.12.2018 5297 25 – Starters 28 - Variations	100% Completed 21.01.2019 5306 – Starters 39 - Variations		
Pension Team PDRs	Not previously reported	100	Nil	Nil	100%	Nil	Nil	Nil	Nil	Nil	Nil	Nil		
Statutory Reports	Not previously reported	95	Nil	Nil	Nil	Fire – SF3	Benchmarking HMRC Mod	Annual Allowance	Nil		Fire Valuation Data 31.12.2018	HMRC AA PIA Report 31.01.2019		

Member Self Service – measured on annual basis, last update January 2019.

Total Registered	2,992		
Last logged in	1492	01/04/2018	03/01/2019
Last logged in	794	01/04/2017	31/03/2018
Last logged in	383	01/04/2016	31/03/2017
Last logged in	273	01/04/2015	31/03/2016

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Total Registered	2,992			
Last logged in	570	In last 3 months	04/10/2018	03/01/2019
Last logged in	1,648	in last year	04/01/2018	03/01/2019
Last logged in	741	in last 2 years	04/01/2017	03/01/2018
Last logged in	358	in last 3 years	04/01/2016	03/01/2017
Last logged in	195	in last 4 years	04/01/2015	03/01/2016
Never logged in	50			

Status breakdown	
1: Active	1,534
2: Undecided Leaver	43
3: Exit - No Liability	195
4: Deferred	761
5: Pensioner	425
6: Widow / Dependant	13
7: Death	6
8: Awaiting Entry	5
9: Frozen Refund	3
A: Non-protected	5
Z: Aggregation	2
TOTAL	2,992