

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	Sept 2018	Oct 2018	Nov 2018	Dec 2018	Jan 2019	Feb 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)	96.55% (28/29)	90% (18/20)
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)	100% (4/4)	100% (9/9)
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)	100% (11/11)	100% (17/17)
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	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	Nil	Nil

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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)	Nil	Nil
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	100% (1/1)	100% (1/1)
Transfers Out Quotes	Issued within 20 working days of notification and all information required to produce a quote.	Not previously reported	100	-	-	100% (6/6)	Nil	100% (1/1)	100% (1/1)	100% (2/2)	0% (0/1)	Nil	100% (1/1)	Nil	100% (2/2)
Deaths	Payment of Death Grant and set up Widow pension within 10 working days	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)	100% (11/11)	100% (6/6)
Pensioner Payroll	Payment of pension benefits to member by last working day of month.	100%	100	100% (19,04.2 018 5,115)	100% (17,05.2 018 5108)	100% (19,06.2 018)	100% (19,07.2 018 5181)	100% (17,08.2 018 5194)	100% (18,09.2 018)	100% (18,10.2 018)	100% (20,11.2 018 5277)	100% (11,12.2 018)	100% (21,01.2 019)	100% (20,02.2 019 5341)	100% (20,03.2 019 5343)

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				24 – Starter s 34 – Variati ons	30 – Starter s 24 – Variati ons	5137 26 – Starter s 26 – Variati ons	51 – Starter s 50 – Variati ons	26 – Starter s 12 – Variati ons	5211 15 – Starter s 13 – Variati ons	5229 31 – Starter s 28 – Variati ons	44 – Starter s 45 – Variati ons	5297 25 – Starter s 28 – Variati ons	5306 – Starter s 39 – Variati ons	32 Starter s 46 Variati ons	28 Starter s 31 Variati ons
Pension Team PDRs	Annual PDRs for staff to take place May/June each year	100	Not previously reported	Nil	Nil	100%	Nil	Nil	Nil	Nil	Nil	Nil	Nil	Nil	Nil
Statutory Reports	Statutory reports, Fire Annual Valuation data, finance reports etc.	95	Not previously reported	Nil	Nil	Nil	Fire – SF3	Bench marking HMRC Mod	Annual Allowa nce	Nil	Nil	Fire Valuati on Data 31.12.2 018	HMRC AA PIA Report 31.01.2 019	Nil	Fire - P.I

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

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

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

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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