

KPI Improvement Plan

Checkpoint Update – 07/11/2024

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Where we expect to be if we take proposed actions



KPIs and Backlog to remain at a similar position. Full training plan implemented and where necessary performance plans.

Recruitment. KPI Policy review. Evolve payroll migration.



1 Jan. - 30 June 2025

Consistently maintain KPIs >90% for all cases with BAU backlog of <100 cases. McCloud implementation. Pension Dashboards preparation.



1 Jan. - 30 June 2026

98% KPIs met with cases worked on SLA –2 working days

Backlog down to >100 cases. All posts filled. Deaths and Retirement KPIs maintained <90%. Altair payroll migration.

1 July - 31 Dec. 2024

95% KPIs met for 6 months. Pension Dashboards go live – spike in workloads

1 July - 31 Dec. 2025

98% KPIs met with cases worked on SLA –2 working days but death cases processed on day of receipt

1 July – 31 Dec. 2026

KPI and Backlog Update

Cases over SLA-Committee Categories

> 1,137 (Nov-23) 824 (June -24) 465 (Aug-24) 436 (Sep)

All cases 1,177 (June-24) 806 (Aug-24) 777 (Sep-24) Frozen refunds

4.533 (Nov – 23

235 (June -24

250 (Aug -24)

236 (Sep - 24

Members 75 or over

Active – 10

Deferred – 57

Status 2 (undecided leaver) – 5 Status 2 (undecided leaver)

1,066 (Nov - 23

30 (June – 24

512 (Aug -24

629 (Sep – 24

Hidden aggregation backlog

Approx.400 (Nov - 23)

499 (June – 24)

104 (Aug-24)

173 (Sep – 24)

Old deaths within SLA but on reply due for >2 months

214 (Nov – 23)

176 (June – 24)

164 (Aug – 24)

173 (Sep -24)

Summary

- Reporting has changed to included every case
- Target to have less than 100 open at 31 December 2024 is on course
- The current KPI percentage for all cases:
 - 30 June 2024 79%
 - 31 August 2024 84.49%
 - 30 September 84.22%
- KPIs will met once the backlog is cleared
- Recruitment still an issue 4 vacancies in Admin

