

Pensions Service Delivery – Appendices 1 to 8

Appendix 1 – Member Communications and Customer Service

Member communication			
	Apr-26	May-26	Jun-26
Emails triaged	4905	4522	5047
Email correspondence	1973	1941	2177
Calls handled	1344	1300	1259
Returned post	161	53	45

Member communication - Voice of the Customer			
	Apr-26	May-26	Jun-26
Qualifying calls	1295	1255	1222
Survey tasks created	602	536	547
Survey tasks returned	149	143	164
Positive feedback	98%	98%	99%
Queries answered at point of contact	98.00%	95.10%	98.20%
Call backs received	93%	87%	99%

Appendix 2 – Casework Volumes and KPI Performance

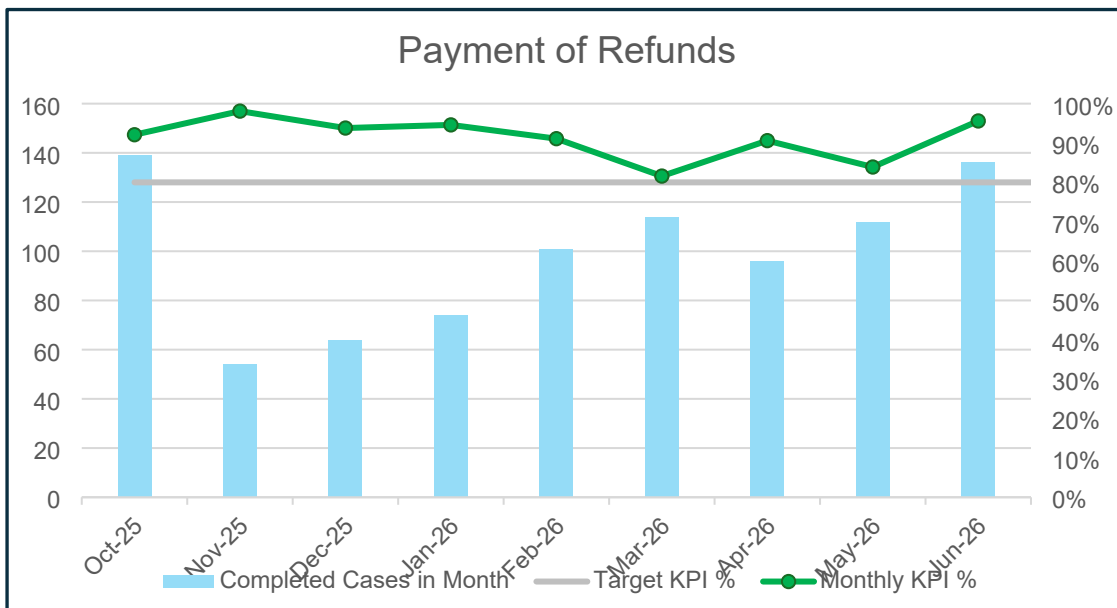
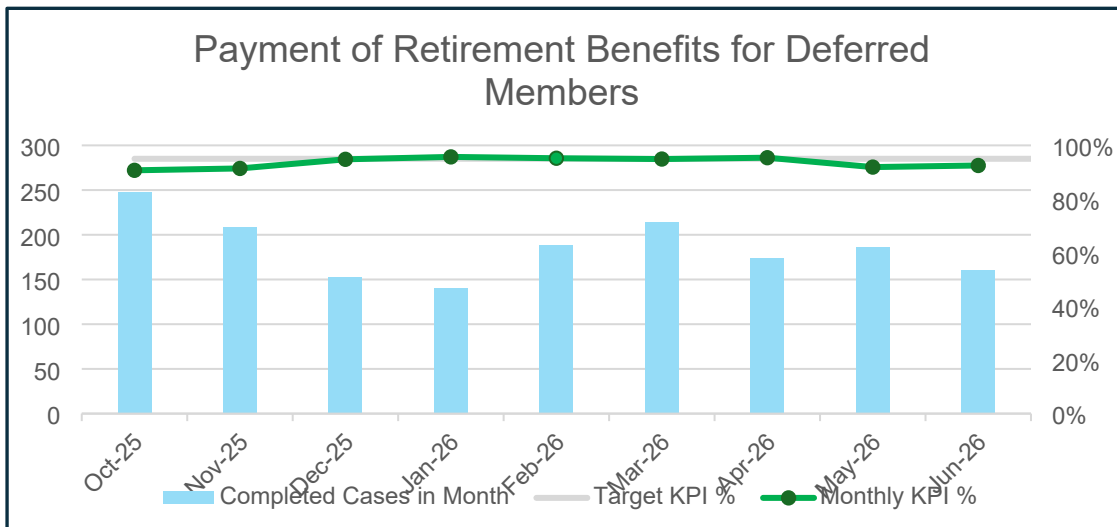
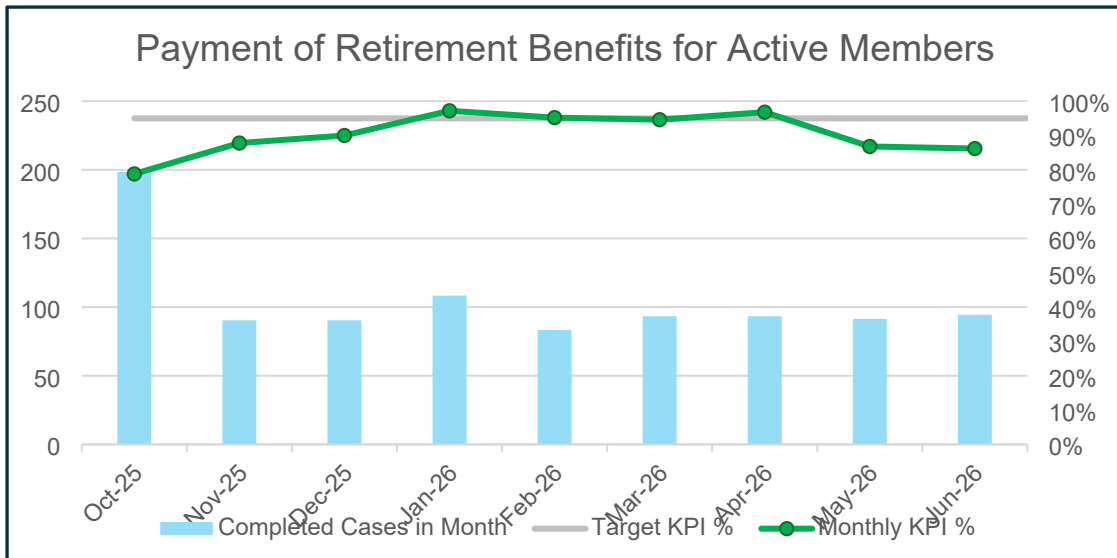
1 April to 30 June 2026:

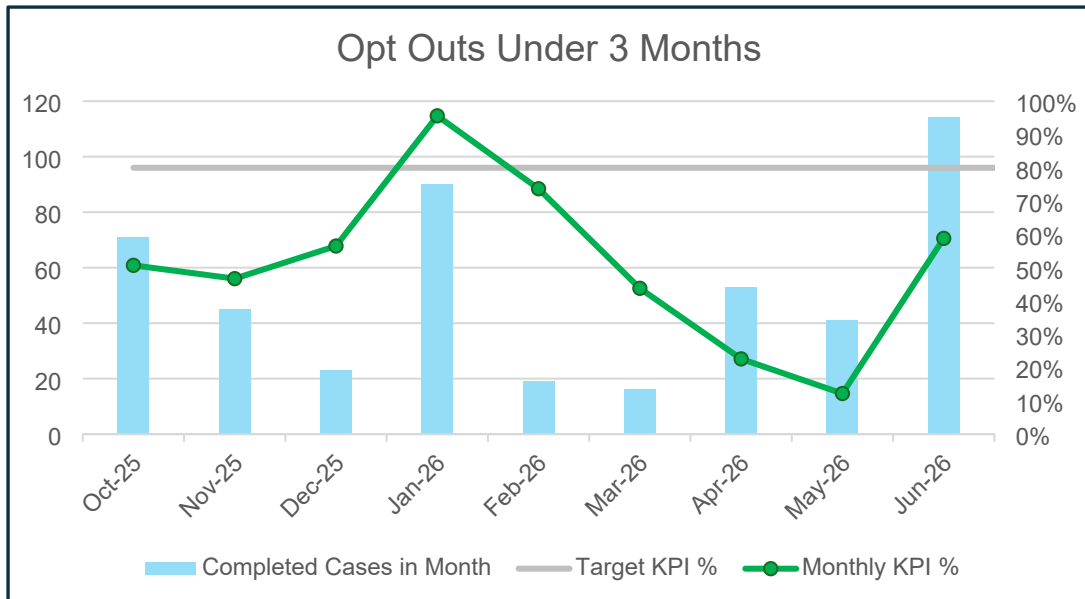
Category	Outstanding at Period Start	Created In Period	Total Cases	Complete at End of Period	Outstanding at End of Period	% Complete	Outstanding (Excluding External Reply Due)	Outstanding (External Reply Due)
Grand Total	5,906	12,802	18,708	11,143	7,565	59.6%	5,576	1,989
A1: Deaths	56	391	447	368	79	82.3%	51	28
A2: Survivors Pensions	55	195	250	166	84	66.4%	44	40
A3: Death Grant Payment	26	94	120	101	19	84.2%	12	7
A4: Payment of Retirement Benefits	471	744	1,215	799	416	65.8%	133	283
A5: Estimate of Retirement Benefits	358	1,190	1,548	1,066	482	68.9%	333	149
A6: Refunds	695	950	1,645	1,024	621	62.2%	301	320
A7: Deferred Benefits	968	953	1,921	656	1,265	34.1%	773	492
A8: LGPS Transfer In	56	59	115	35	80	30.4%	45	35
A9: LGPS Transfer Out	428	273	701	217	484	31.0%	372	112
A10: Aggregation	2,156	1,278	3,434	118	3,316	3.4%	2,993	323
A11: Non LGPS Transfer In	32	58	90	54	36	60.0%	20	16
A12: Non LGPS Transfer Out	142	133	275	119	156	43.3%	91	65
A13: Divorces	26	147	173	112	61	64.7%	44	17
A14: General Correspondence	156	1,940	2,096	2,038	58	97.2%	37	21
A15: Change of Details	47	1,179	1,226	1,209	17	98.6%	13	4
A16: Lost Pension	45	133	178	152	26	85.4%	17	9
A17: New Joiners	0	2,959	2,959	2,702	257	91.3%	242	15
A18: Opt Outs	189	126	315	207	108	65.7%	55	53

Category	Subcategory	Complete at End of Period	# Completed Within KPI Target	% Complete Within KPI Target	# Completed Within Legally Required Response Time	% Complete Within Legal Target
A1: Deaths	B1: Initial Death Notification	368	334	90.8%	360	97.8%
A2: Survivors Pensions	B2: Survivors Pensions Pensioner or Deferred Pensioner (Actual)	124	91	73.4%	124	100.0%
	B3: Survivors Pensions Death in Service (Actual)	6	5	83.3%	6	100.0%
	B4: Survivors Pensions (Estimate)	36	31	86.1%	36	100.0%
A3: Death Grant Payment	B5: Death Grant Payment (Pensioner, Deferred Pensioner, Death in Service)	101	85	84.2%	101	100.0%
A4: Payment of Retirement Benefits	B6: Payment of Retirement Benefits for Active members (Actual)	278	249	89.6%	277	99.6%
	B7: Payment of Retirement Benefits for Deferred Benefit members (Actual)	521	486	93.3%	518	99.4%
A5: Estimate of Retirement Benefits	B8: Estimate of Retirement Benefits for Active members	479	469	97.9%	478	99.8%
	B9: Estimate of Retirement Benefits for Deferred Benefit members	587	579	98.6%	584	99.5%
A6: Refunds	B10: Notification of Refund Entitlement	682	558	81.8%	558	81.8%
	B11: Payment of Refunds	342	309	90.4%	339	99.1%
A7: Deferred Benefits	B12: Provision of Deferred Benefit Statements	656	565	86.1%	565	86.1%
A8: LGPS Transfer In	B13: LGPS Transfer In Estimates	8	3	37.5%	5	45.5%
	B14: LGPS Transfer In Actuals	24	3	12.5%	22	91.7%
A9: LGPS Transfer Out	B15: LGPS Transfer Out Estimates	154	71	46.1%	142	92.2%
	B16: LGPS Transfer Out Actuals	63	6	9.5%	47	74.6%
A10: Aggregation	B17: Aggregation In Estimates	33	27	81.8%	27	81.8%
	B18: Aggregation In Actuals	83	34	41.0%	34	41.0%
	B19: Reversal of Auto Aggregation	2	2	100.0%	2	100.0%
A11: Non LGPS Transfer In	B20: Non LGPS Transfer In Estimate	44	22	50.0%	43	97.7%
	B21: Non LGPS Transfer In Actual	10	5	50.0%	7	70.0%
A12: Non LGPS Transfer Out	B22: Non LGPS Transfer Out Estimate	106	76	71.7%	103	97.2%
	B23: Non LGPS Transfer Out Actual	13	8	61.5%	11	84.6%
A13: Divorces	B24: Pension Sharing on Divorce Estimates	106	102	96.2%	106	100.0%
	B25: Pension Sharing on Divorce Implementations	6	6	100.0%	6	100.0%
A14: General Correspondence	B26: General Correspondence with scheme members	2,038	1,992	97.7%	2,014	98.8%
A15: Change of Details	B27: Change of Scheme Member Details	1,209	1,155	95.5%	1,173	97.0%
A16: Lost Pension	B28: Lost Pension	152	133	87.5%	143	94.1%
A17: New Joiners	B29: New Starters to the Scheme	2,702	2,702	100.0%	2,702	100.0%
A18: Opt Outs	B30: Opt Outs under 3 months	207	84	40.6%	106	51.2%

Retirements Team

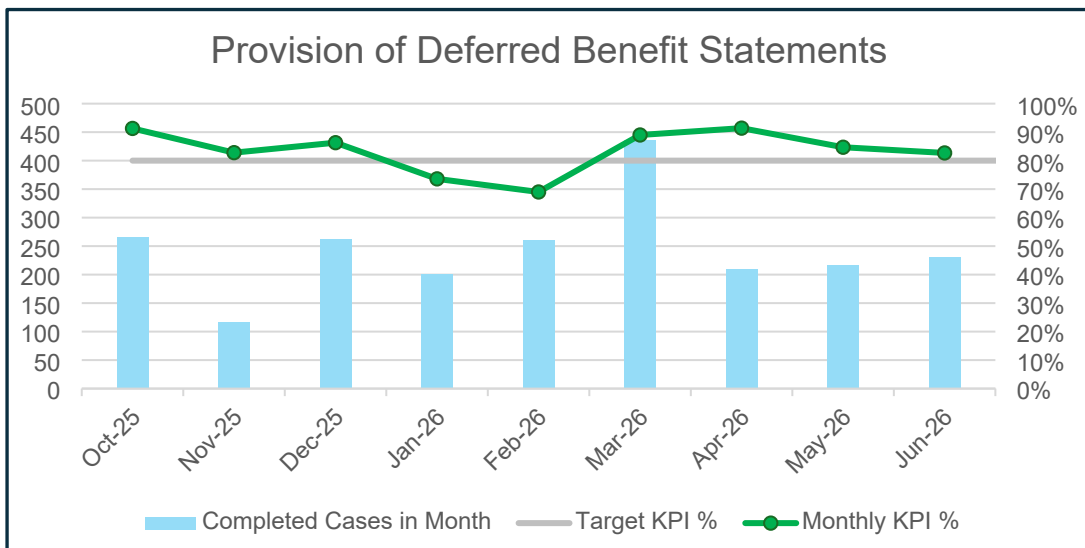
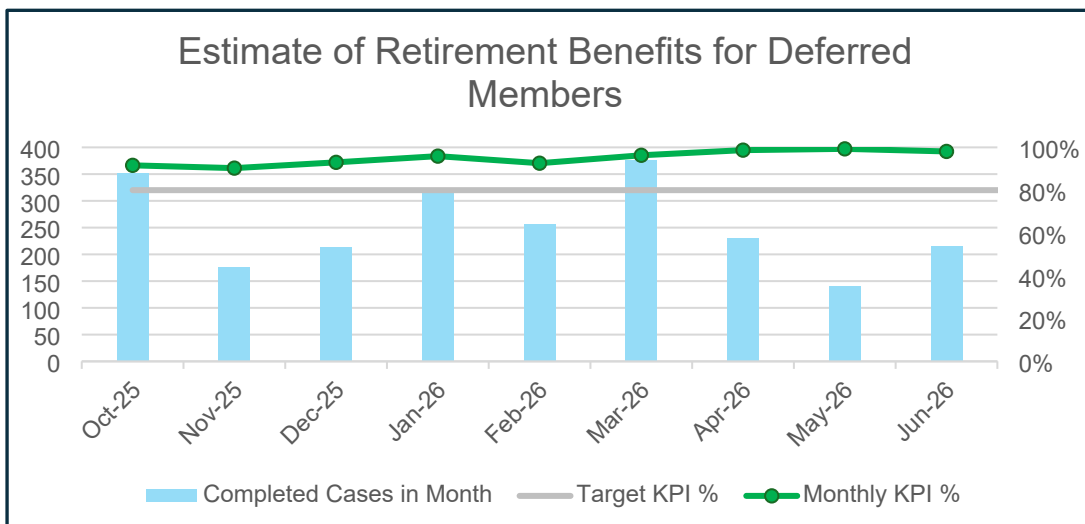
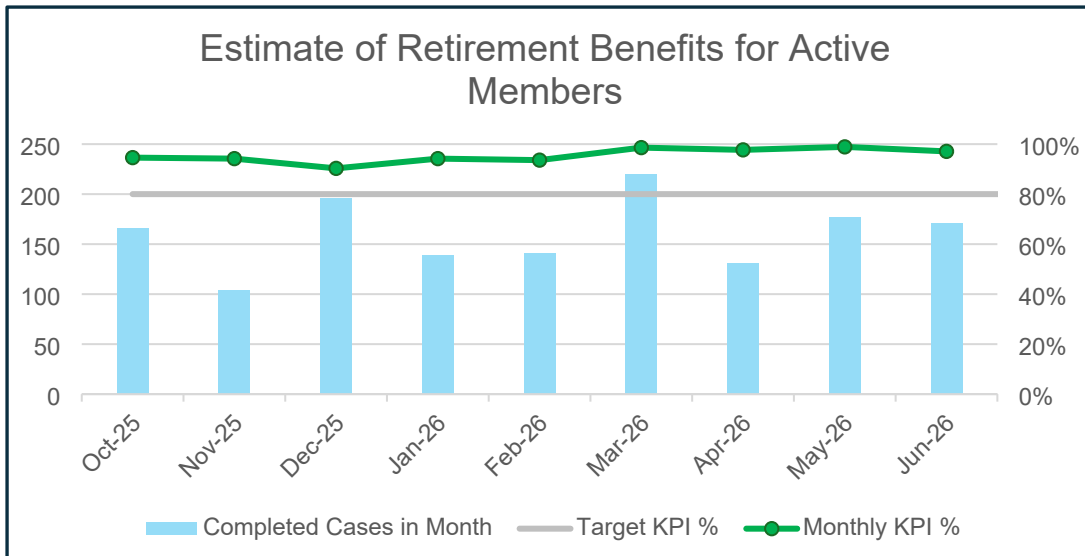
Key Performance Indicators						
	Apr-26		May-26		Jun-26	
	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Retirement Team						
Active members	93	96.8	91	86.8	94	86.2
Deferred members	174	95.4	186	91.9	160	92.5
Refund notifications	168	79.2	188	76.1	326	86.5
Refund payments	96	90.6	112	83.9	136	95.6
Opt outs	53	22.6	41	12.2	114	58.8

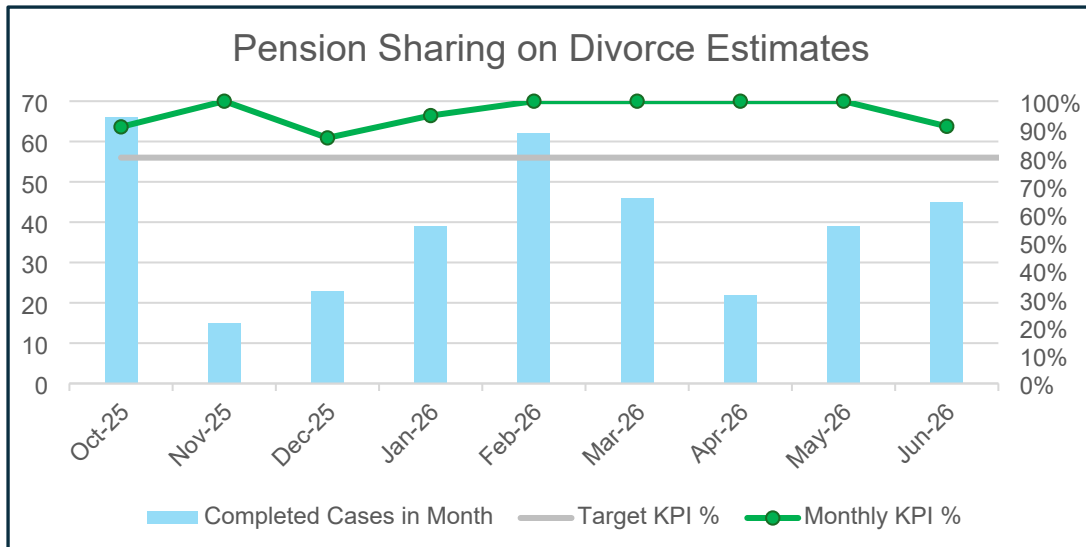




Estimates and Divorce Team

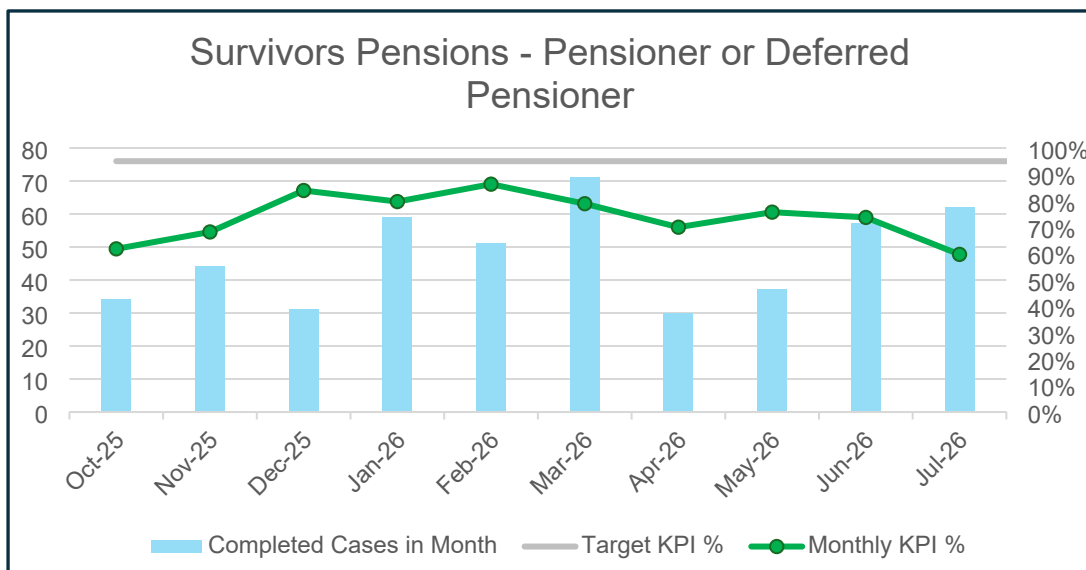
Key Performance Indicators						
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Estimate Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Active members	131	97.7	177	98.9	171	97.1
Deferred members	231	98.7	141	99.3	215	98.1
DB's	209	91.4	216	84.7	231	82.7
Divorce - quotes	22	100	39	100	45	91.1
Divorce actual	3	100	1	100	2	100
Lost pension	59	76.3	38	92.1	55	96.4

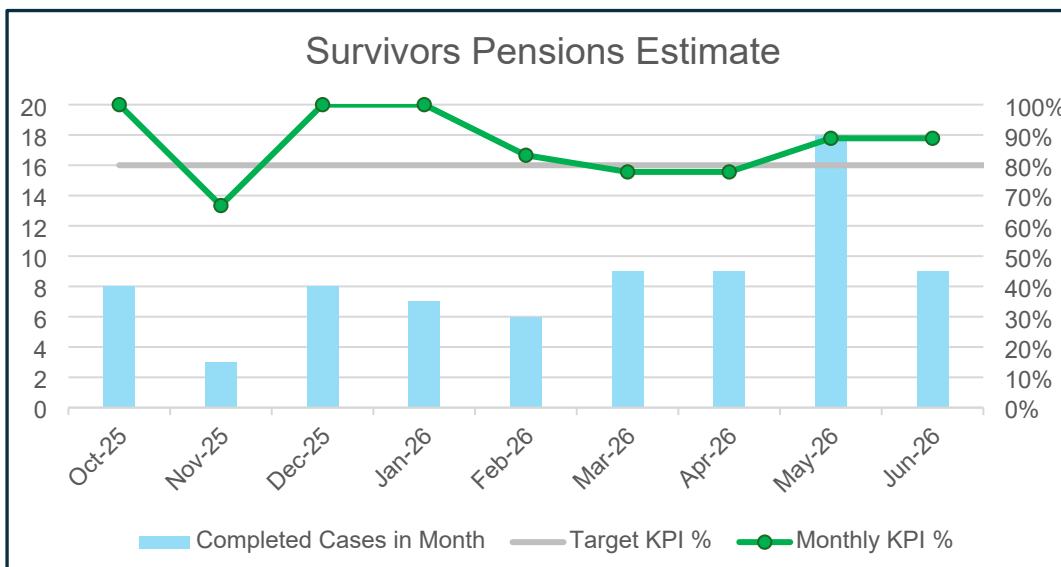
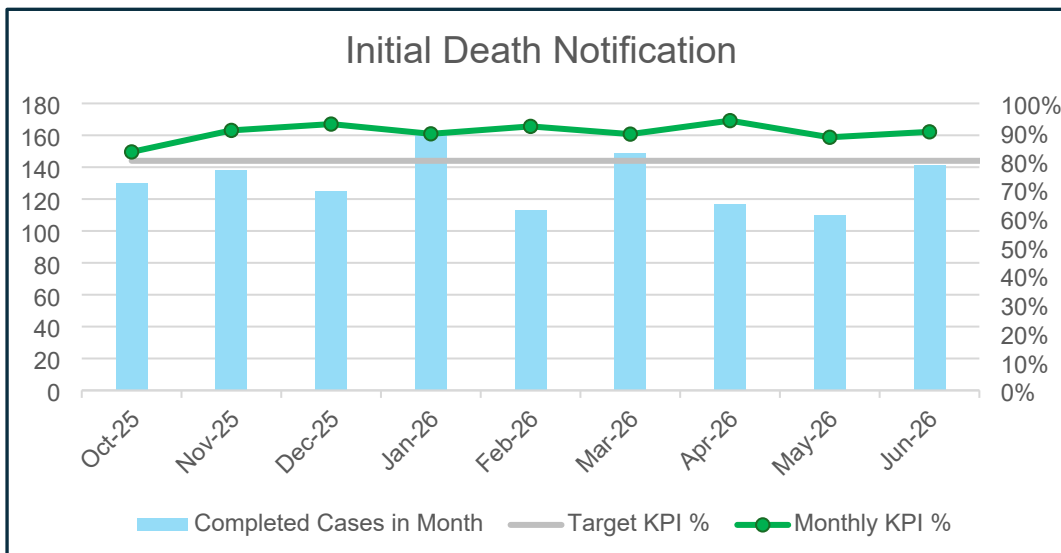
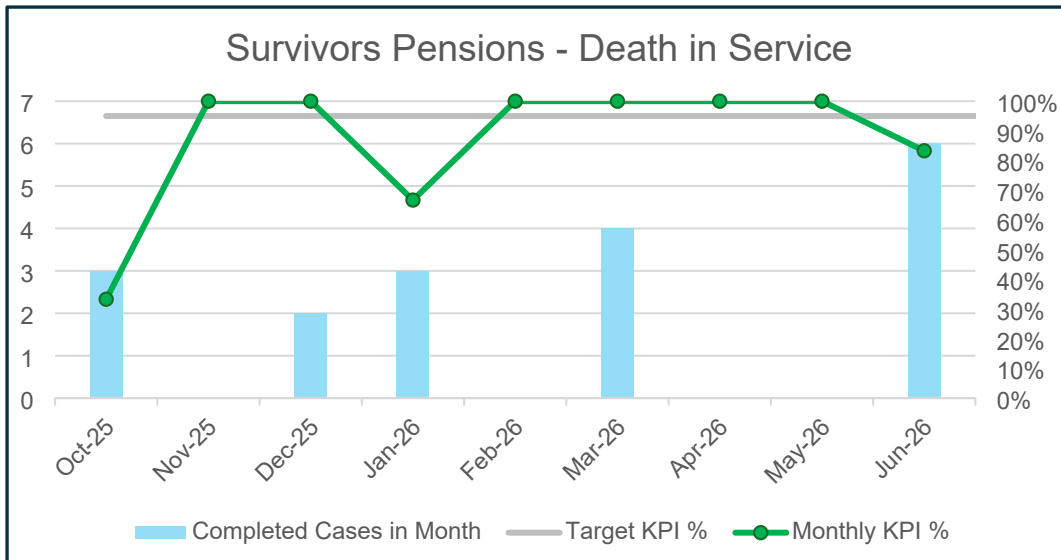


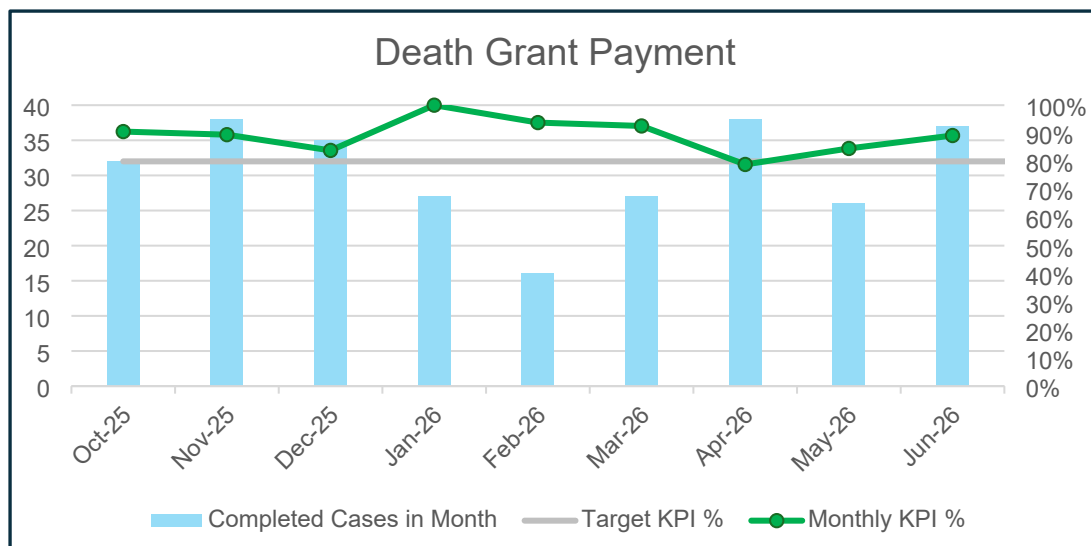


Death Team

Key Performance Indicators						
	Apr-26		May-26		Jun-26	
Death Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Survivors - Def/Pensioner	30	70	37	75.7	57	73.7
Survivors - DIS	0		0		6	83.3
Initial deaths	117	94	110	88.2	141	90.1
Survivors - estimates	9	77.8	18	88.9	9	88.9
Death Grant payments	38	78.9	26	84.6	37	89.2

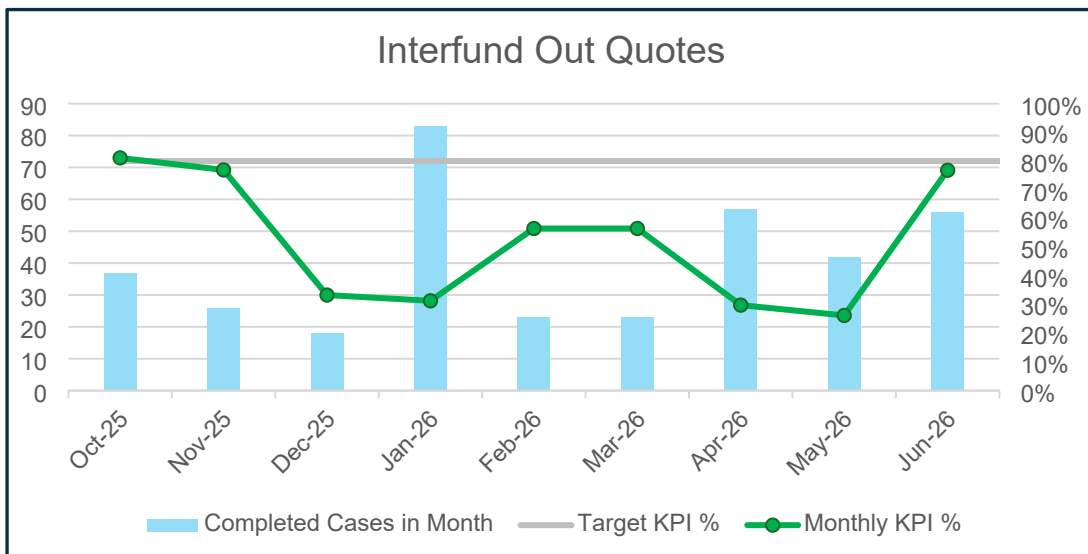
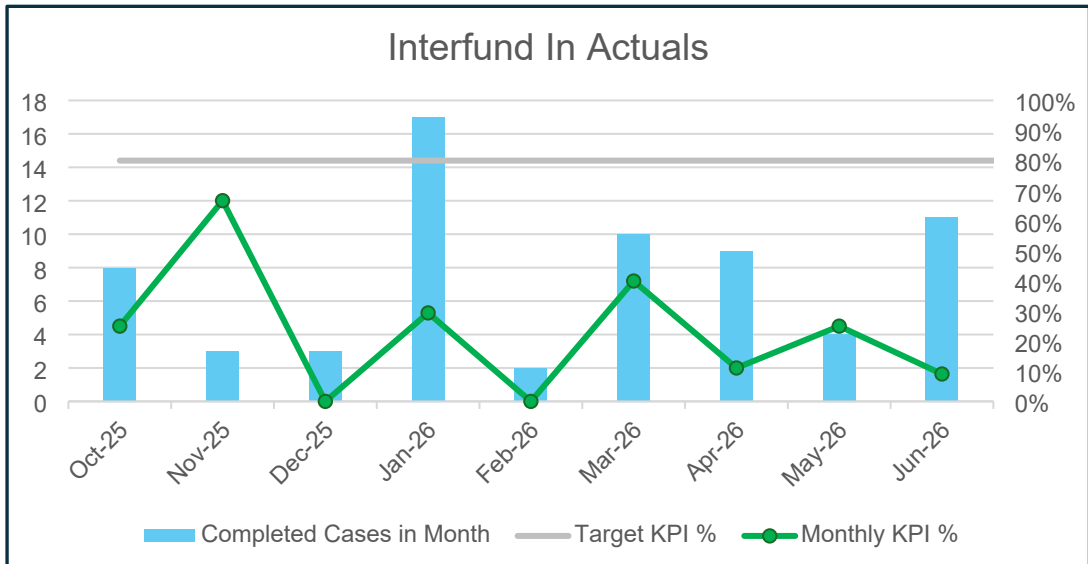
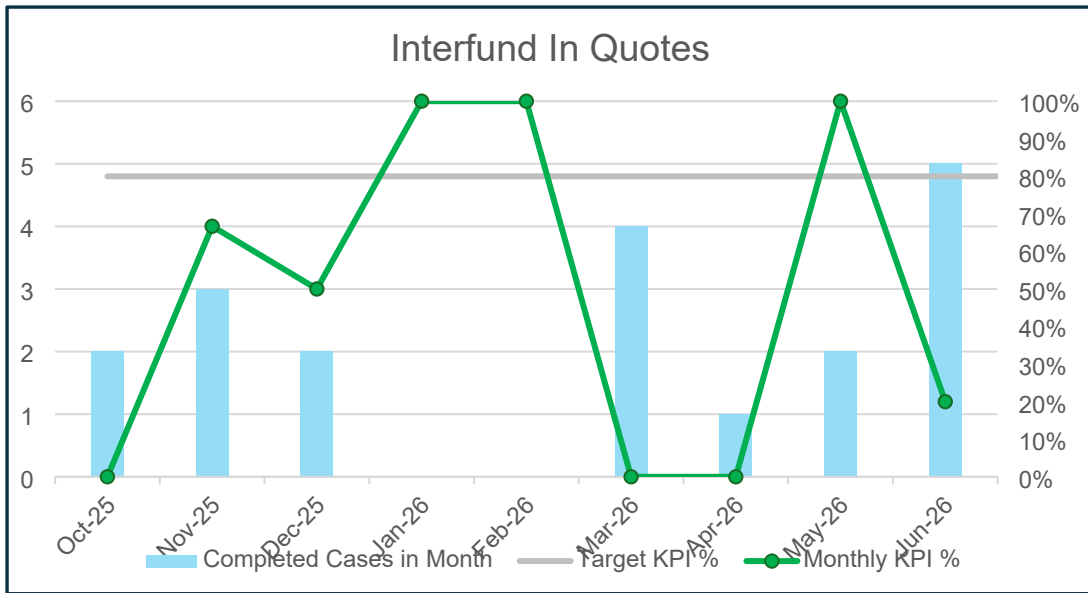


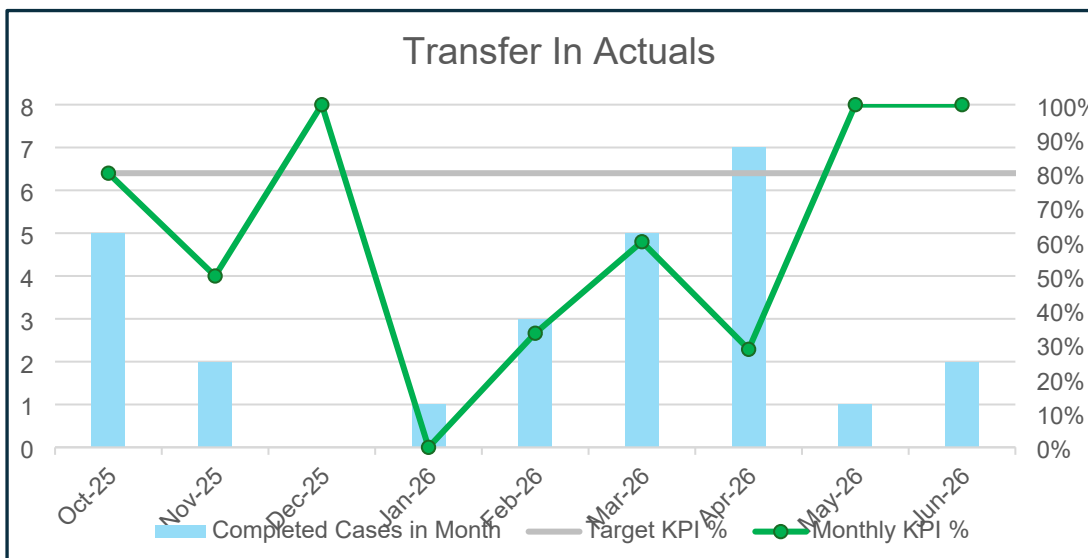
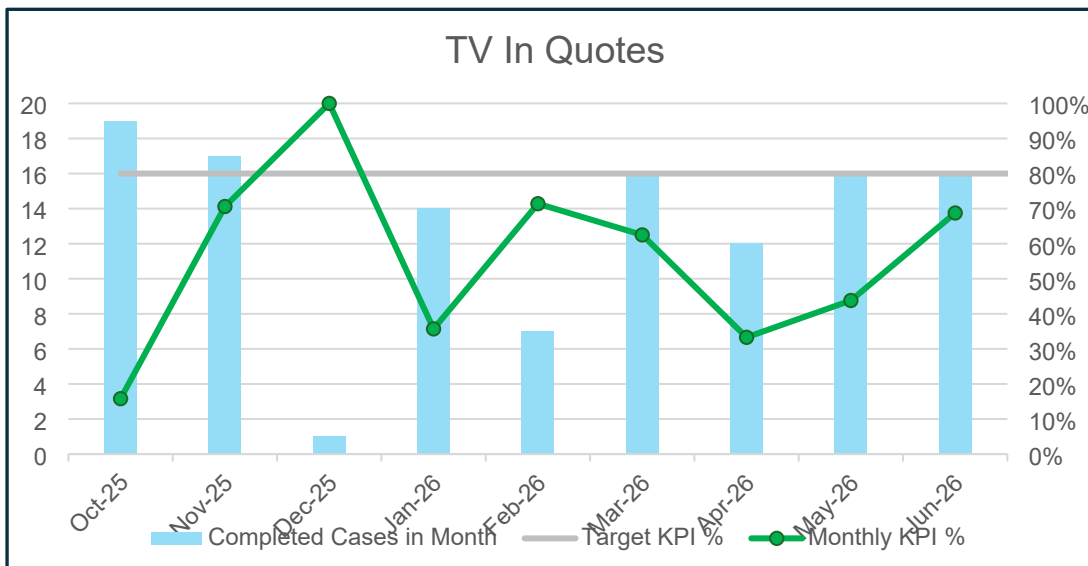
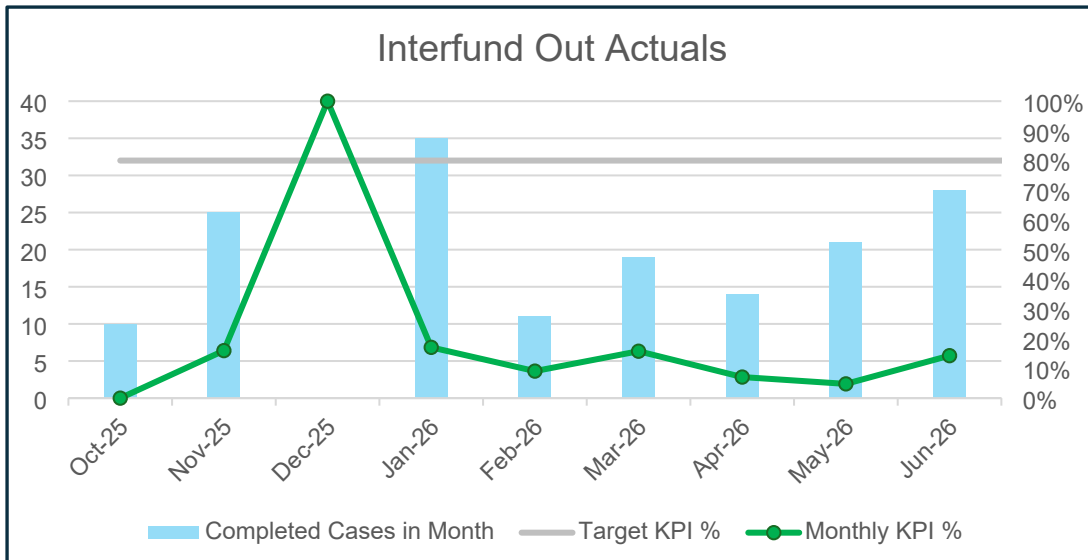


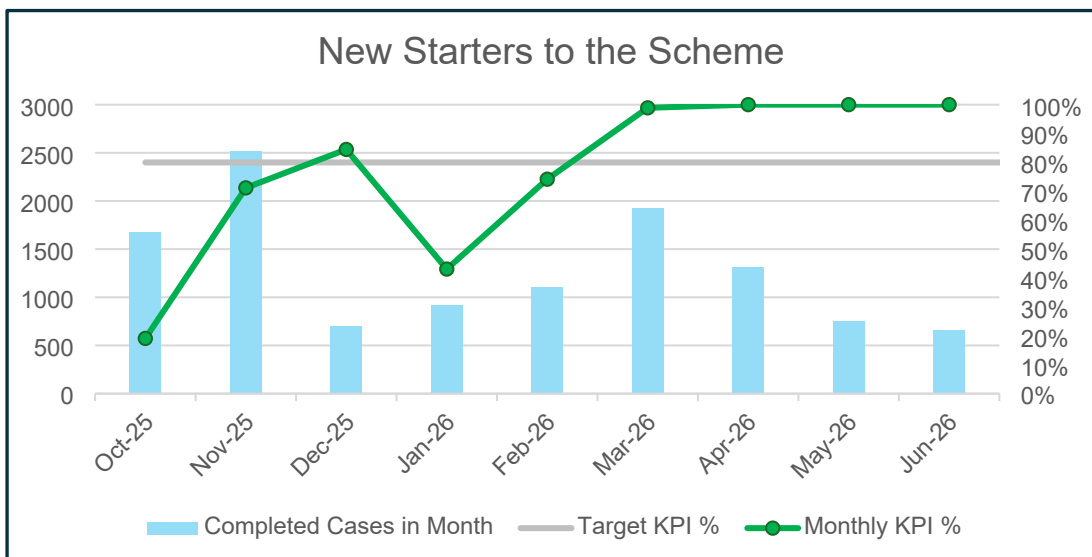
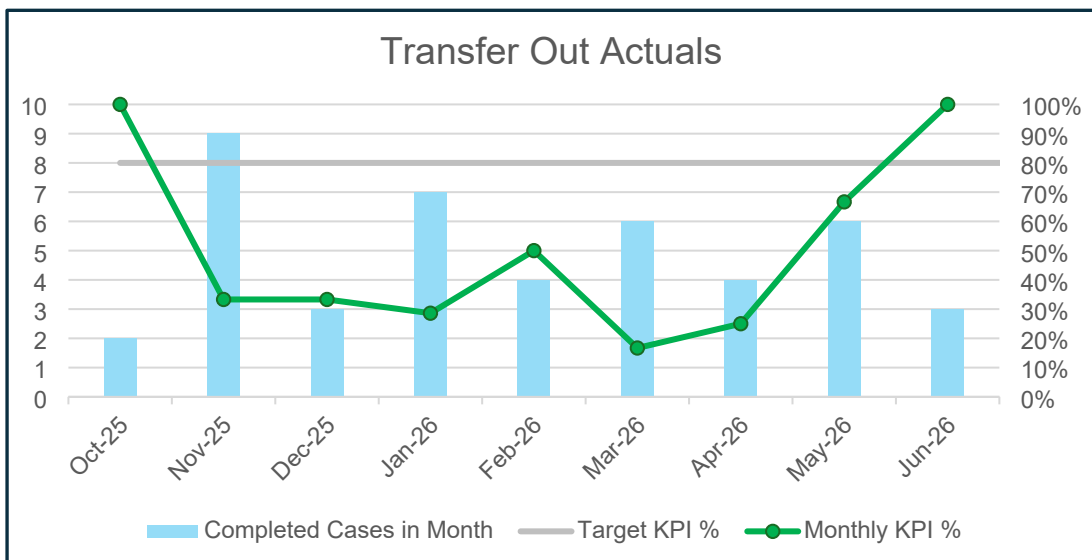
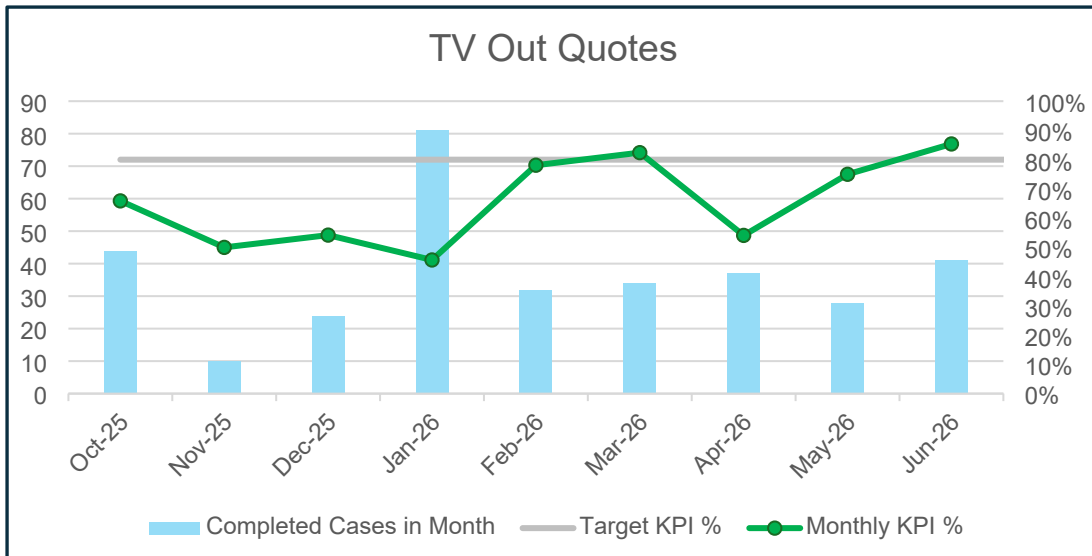


Transfer and Interfund Team

Key Performance Indicators						
	Apr-26		May-26		Jun-26	
Transfer/Interfund Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Interfund In Quotation	0	0	2	100	5	20
Interfund In Actuals	9	11.1	4	25	11	9.1
Interfund Out Quotation	57	29.8	42	26.2	56	76.8
Interfund Out Actual	14	7.1	21	4.8	28	14.3
Transfer In Quotation	12	33.3	16	43.8	16	68.8
Transfer In Actuals	7	28.6	1	100	2	100
Transfer Out Quotation	37	54.1	28	75	41	85.4
Transfer Out Actual	4	25	6	66.7	3	100
New Starters	1316	100	751	100	660	100

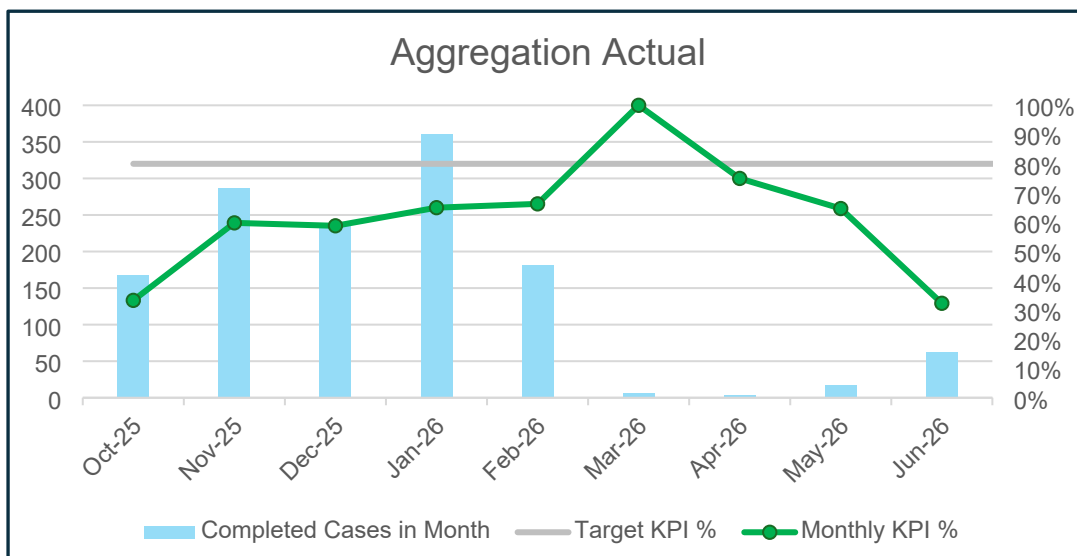
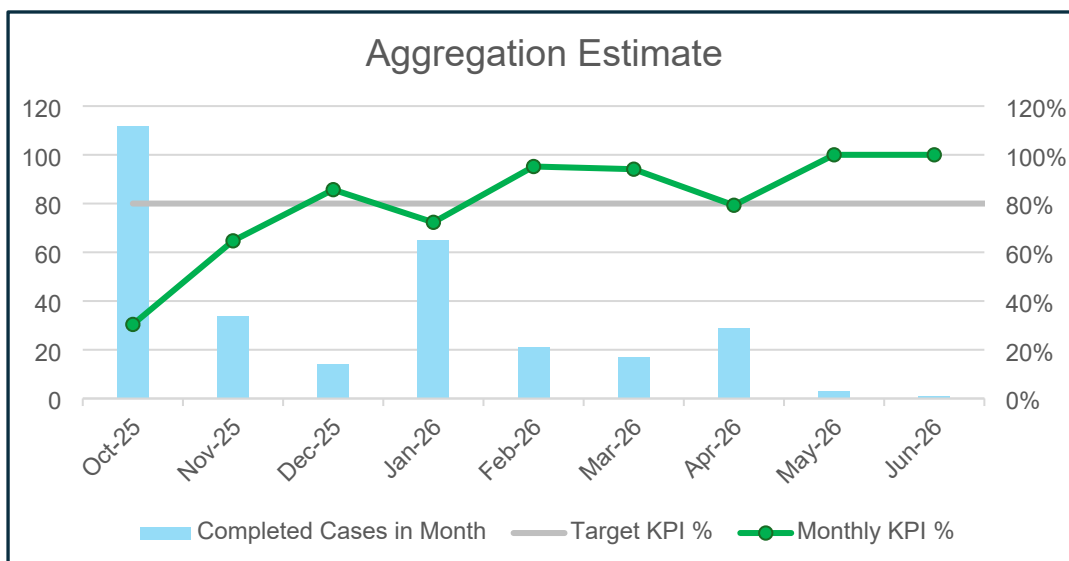


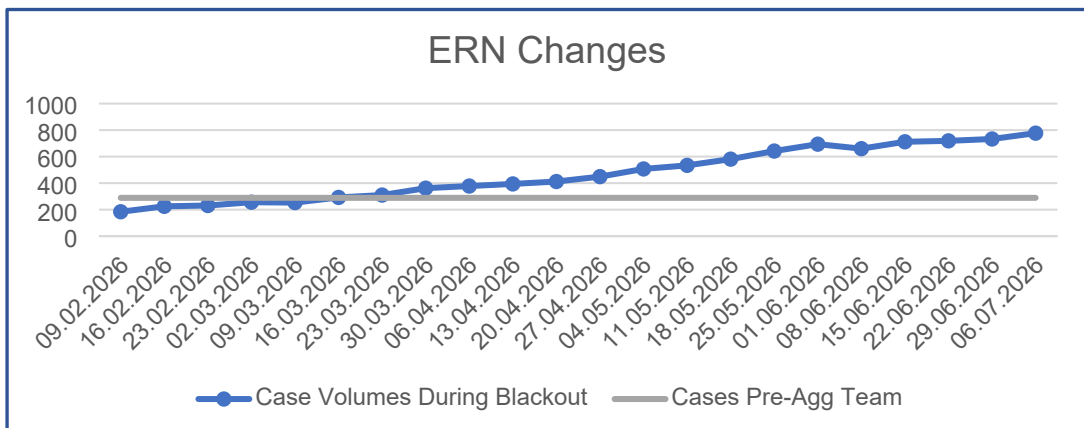
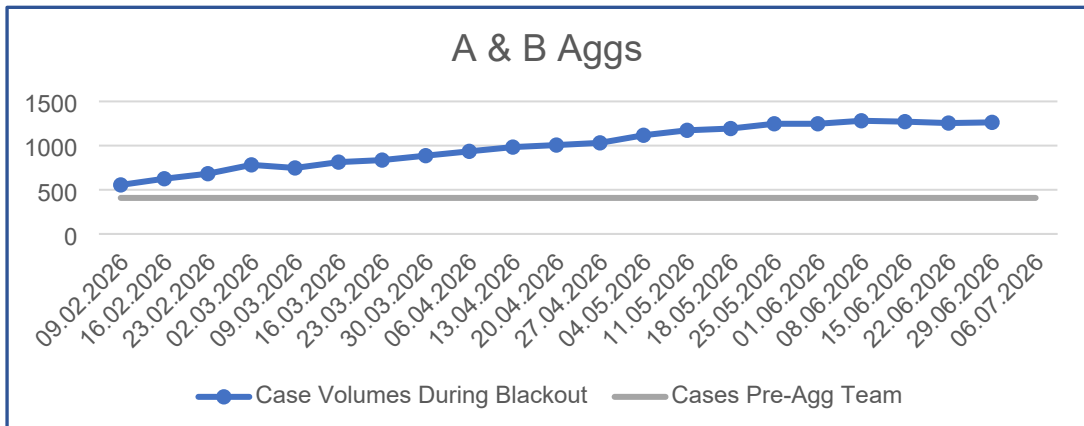
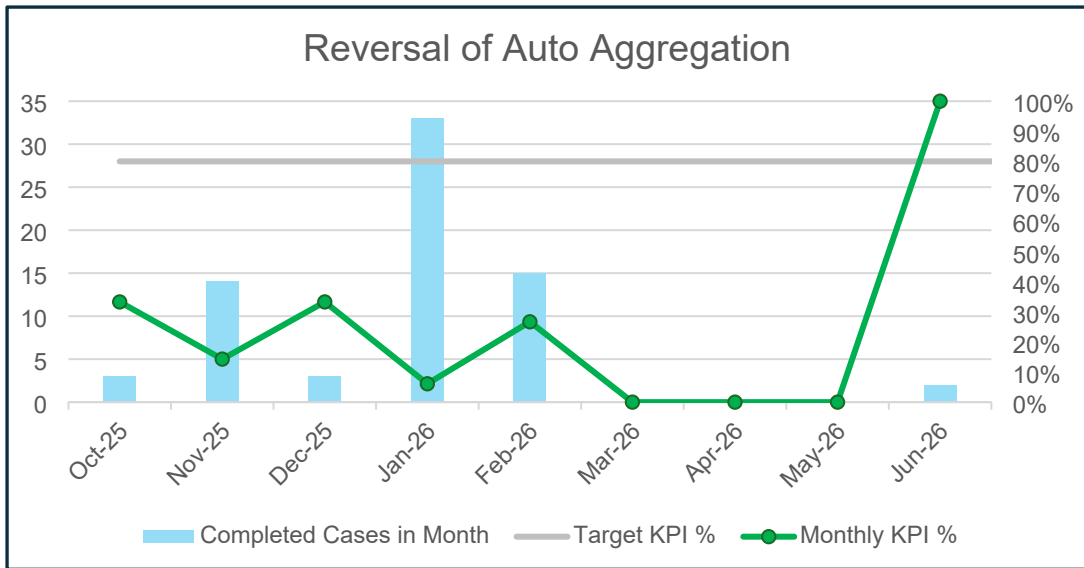


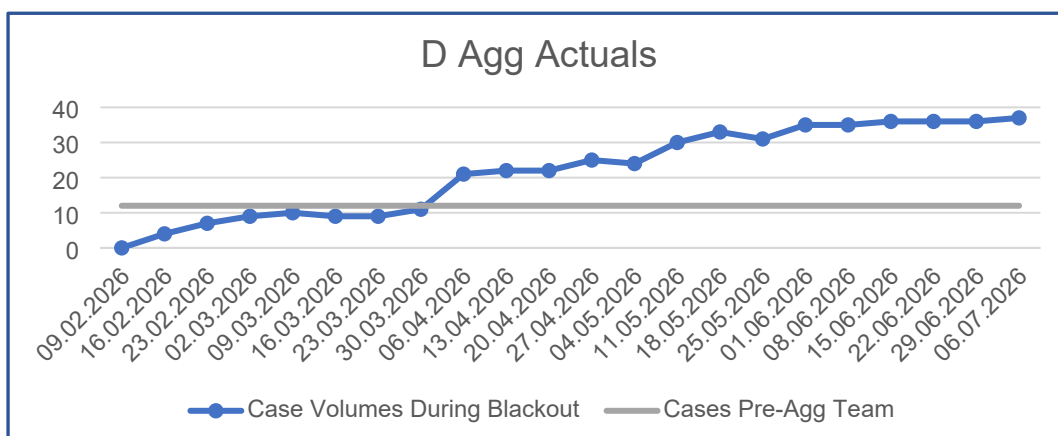
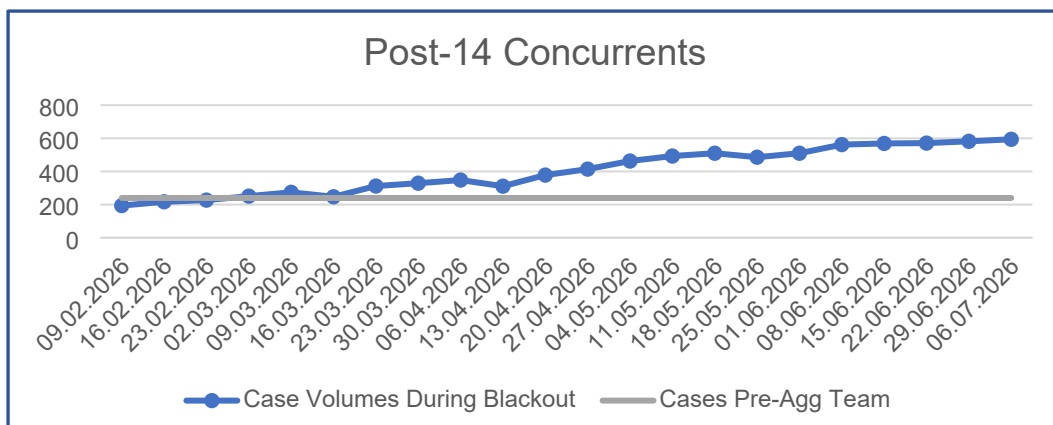


Aggregation Team

Key Performance Indicators						
	Apr-26		May-26		Jun-26	
Aggregation Team	Completed cases	KPI %	Completed cases	KPI %	Completed cases	KPI %
Aggregation estimates	29	79.3	3	100	1	100
Aggregation actuals	4	75	17	64.7	62	32.3
Reversal of auto agg	0	NA	0	NA	2	100







General Correspondence/Amendments

KPI Area	General Correspondence	
Month	Completed Cases in Month	Monthly KPI %
Apr-26	655	98.20
May-26	658	97.70
Jun-26	729	97.40

KPI Area	Change of Scheme Member Details	
Month	Completed Cases in Month	Monthly KPI %
Apr-26	471	95.1
May-26	342	95.9
Jun-26	396	95.7

Appendix 3 – Backlog Progress Update

Case Type	Tender	Processed	Complete - Billed	% processed v tender	% complete v tender
Leaver - Aggregation	7,932	1,639	1,635	20.66%	20.61%
Leaver - Deferment	6,465	2,285	2,272	35.34%	35.14%
Leaver - Refund	2,811	838	641	29.81%	22.80%
Leaver - Concurrency	2,449	330	330	13.47%	13.47%
Interfund in	2,417	438	298	18.12%	12.33%
Interfund out	650	118	98	18.15%	15.08%
Leaver - Opt Out	289	Included in deferment and refund reporting			
Total	23,013	5,648	5,274	24.54%	22.92%

Appendix 4 – Member Engagement

Month	Emails	Calls	1:1 visits	Website Visits	MyPension Online (MPO) registration queries
Apr	1,973	1,375	0	15,434	634
May	1,941	1,300	1	12,053	563
Jun	2,177	1,337	2	13,685	554

Appendix 5 – MyPension Online Registrations

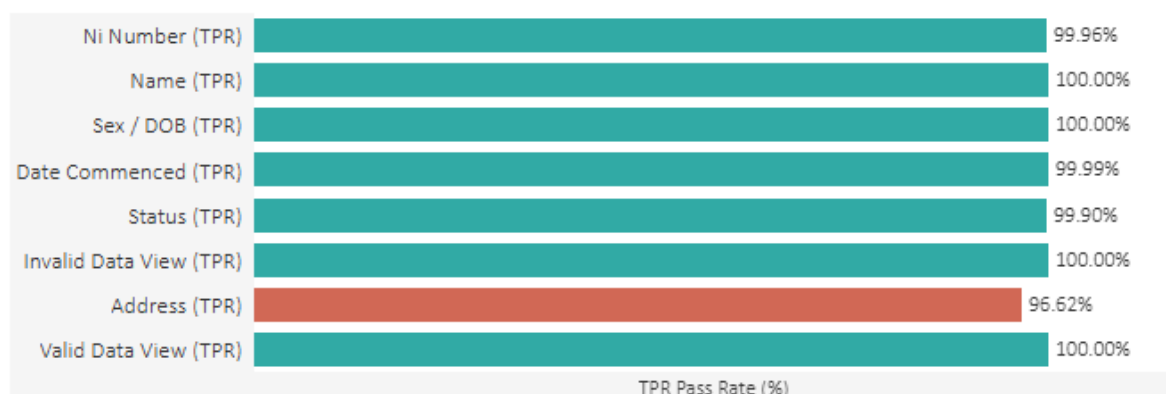
	Unique member records				Employment records		
	Apr	May	Jun		Apr	May	Jun
Active	19,671	19,983	20,271		21,373	21,719	22,014
Deferred	10,258	10,496	10,755		11,530	11,797	12,090
Pensioner	10,630	10,940	11,178		12,354	12,711	12,995

Appendix 6 – Data Quality

Data Type	TPR Pass Rate %	
	Jan – Mar	Apr – Jun
Common	98.00	97.7
Scheme Specific	83.15	97.95

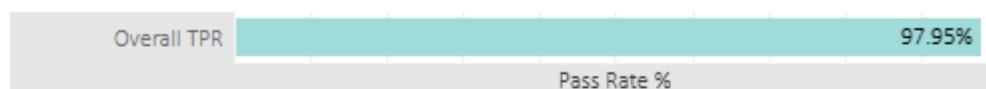
Common Data:

TPR Pass Rate % by Test Category

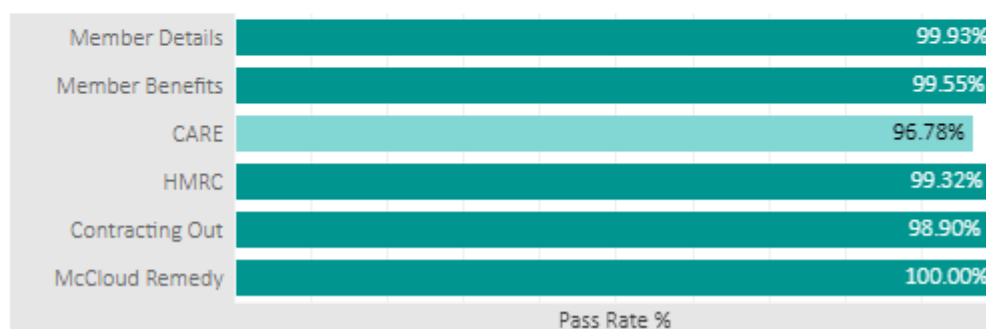


Scheme Specific Data:

Grand Total | TPR Pass Rate %



Grand Total | TPR Pass Rate % by Test Category



Appendix 7 – iConnect Onboarding

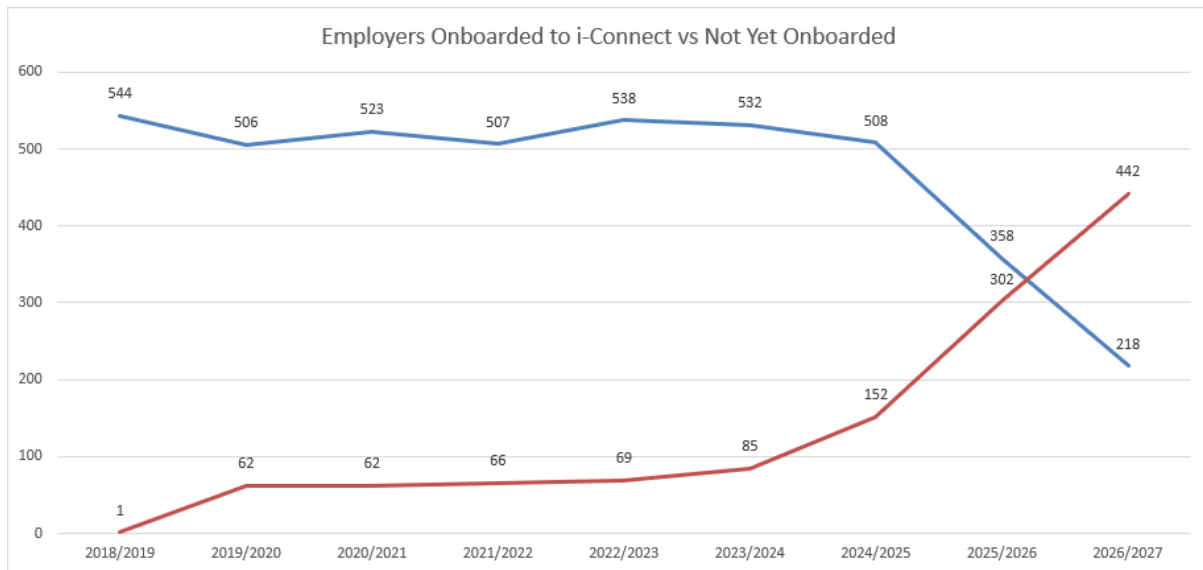
01/04/2026	Gravesham Borough Council
01/04/2026	Medway Council
01/04/2026	St George's CE High School - KCC
01/04/2026	Mid Kent College
01/04/2026	John Maybe Academy - TEN
01/04/2026	New Line Learning Academy - FST
01/04/2026	Cornwallis Academy - FST
01/04/2026	Westlands Primary School (Academy) - SWA
01/04/2026	Holcombe Grammar School - TSAT

01/04/2026	The Abbey School (Academy) - HSAT
01/04/2026	Meopham School (Academy) - SWA
01/04/2026	Regis Manor Community Primary School (Academy) - SWA
01/04/2026	Milstead & Frinsted Acad - OCT
01/04/2026	Selling Primary Academy - OCT
01/04/2026	Lynsted & Norton Academy - OCT
01/04/2026	Homewood Academy – TEN
01/04/2026	Sittingbourne Academy - SWA
01/04/2026	Victory Academy - TSAT
01/04/2026	The John Wallis Academy - JWA
01/04/2026	Goodwin Academy – TSAT
01/04/2026	The Westlands Academy - SWA
01/04/2026	Rochester Grammar School (Academy) - TSAT
01/04/2026	Walderslade Girls Academy - SFLT
01/04/2026	Whitecliffs Primary Acad - SSE
01/04/2026	Shatterlocks Infant Acad - SSE
01/04/2026	Barton Junior Sch Acad - SSE
01/04/2026	Astor College Academy - SSE
01/04/2026	Greenacre Academy - SFLT
01/04/2026	All Faiths School Academy-TSAT
01/04/2026	Sturry CE Primary School (Academy) - SAT
01/04/2026	Water Meadows Academy - SAT
01/04/2026	Tiger Free Sch Academy - FST
01/04/2026	St James CE Primary School Academy - MAS
01/04/2026	The Academy of Woodlands - RIT
01/04/2026	Chantry Academy - SFLT
01/04/2026	St Peter's CEP School - KCC
01/04/2026	Staplehurst School - KCC
01/04/2026	Five Acre Wood School - KCC
01/04/2026	Laleham Gap School - KCC
01/04/2026	Foreland Fields School - KCC

01/04/2026	Grange Park School - KCC
01/04/2026	Petham Primary Academy - OCT
01/04/2026	Wayfield Primary Academy - PRFT
01/04/2026	Luton Academy - RIT
01/04/2026	Gordon Schools Federation - TSAT
01/04/2026	Bradfields Academy - FORT
01/04/2026	Adisham CEP School (Academy) - SAT
01/04/2026	Warren Wood Academy - SFLT
01/04/2026	Cuxton Infant School - PRFT
01/04/2026	Cuxton Juniors School - PRFT
01/04/2026	Inspire Academy - RIT
01/04/2026	New Horizons Children's Academy - TSAT
01/04/2026	The Howard School (Academy) - HSAT
01/04/2026	Lansdowne Primary School (Academy) - SAT
01/04/2026	South Borough Primary (Academy) - SWA
01/04/2026	Lydd Primary Academy - OCT
01/04/2026	Beaver Green School (Academy) - SWA
01/04/2026	Waterfront UTC - HSAT
01/04/2026	Medway Anglican Central - MAS
01/04/2026	Finberry Park Primary Acad - SAT
01/04/2026	Istead Rise Primary Acad - SWA
01/04/2026	Thistle Hill Academy - SAT
01/04/2026	Dymchurch Primary Academy - OCT
01/04/2026	North Kent College
01/04/2026	Howard Academy Central - HSAT
01/04/2026	Rivermead Trust Central - RIT
01/04/2026	Temple Mill Academy HSAT
01/04/2026	Priory Fields Academy - WHN
01/04/2026	Cedar Primary Academy - TSAT
01/04/2026	Halfway Houses - ISL
01/04/2026	Deanwood Primary Academy - HSAT

01/04/2026	Pilgrim Academy - PILT
01/04/2026	Westcourt Academy - PRFT
01/04/2026	Tenterden Infants Acad - TEN
01/04/2026	Tenterden Junior Acad - TEN
01/04/2026	St Michaels Primary Acad - TEN
01/04/2026	St Martin's Primary Acad - WHN
01/04/2026	Richmond Academy - SAT
01/04/2026	Minster In Sheppey Academy - ISL
01/04/2026	Thinking Schools Academy Trust - TSAT
01/04/2026	Thamesview Primary Acad - HSAT
01/04/2026	The Oaks Infant Academy - OCT
01/04/2026	Bredgar Primary Academy - OCT
01/04/2026	Borden Primary Academy - OCT
01/04/2026	Minterne Junior Academy - OCT
01/04/2026	Whitstable CC Academy - SWA
01/04/2026	St Marks Academy Eccles - PILT
01/04/2026	Rowans Pupil Ref Unit - HSAT
01/04/2026	Mierscourt School - HSAT
01/04/2026	St Margaret Troytown Acad - PILT
01/04/2026	Vale View Academy - WHN
01/04/2026	Hilltop Primary Academy - SFLT
01/04/2026	PIE Central Staff - OCT
01/04/2026	Cage Green Academy - MLT
01/04/2026	Rolvenden Academy - TEN
01/04/2026	Wainscott Academy - PRFT
01/04/2026	Chilmington Green School - SAT
01/04/2026	Pilgrims Trust Central - PILT
01/04/2026	Rivermill Free School - MLT
01/04/2026	Sunny Bank Academy - ISL
01/04/2026	Capel Manor College
01/04/2026	North West Kent APS Acad - ALT

01/04/2026	Springhead Park Acad - PRFT
01/04/2026	The North Academy - SWA
01/04/2026	St Margaret's Jnr Academy - MAS
01/04/2026	Will Adams Centre -ALT
01/04/2026	Hoo St Werburgh Academy - RIT
01/04/2026	Walderslade Primary Academy - RIT
01/04/2026	Rivermead Academy - RIT
01/04/2026	Maritime Academy - TSAT
01/04/2026	Rochester Riverside Acad -PILT
01/04/2026	The Holmesdale Academy – SWA
01/04/2026	St John's Inf Academy - MAS
01/04/2026	All Saint's Academy - MAS
01/04/2026	Estuary Academy Island - ALT
01/04/2026	Hempstead Infants Sch - Medway
01/04/2026	Hempstead Junior Sch - Medway
01/04/2026	Nourish Cont Catering - SAT
01/04/2026	Cucina Restaurants Ltd
01/04/2026	Kent Gurkha Company LTD
01/04/2026	Nore Academy - ALT
01/04/2026	Parkwood Fed Acad - PRFT
01/04/2026	Broadstairs and St Peters TC
01/04/2026	Fairview Primary Sch - Medway
01/04/2026	St Crispins Infant Acad - SAT
01/04/2026	BOUGHTON MONCHELSEA PC
01/04/2026	Birchington PC
01/04/2026	Guston COE Primary Acad - CDT
01/04/2026	The Leigh UTC
01/04/2026	St Augustines – Hythe – KCP
01/04/2026	Wickhambreaux CoE Acad - DAT



Red line = employers onboarded to iConnect

Blue line = employers not onboarded to iConnect

Appendix 8 – Complaints, Compliments and Comments

	Complaints	Compliments	Comments
Apr	4 X3 – Poor Communication X1 - Third party/contracted service supplier	4 Good Communication	5 Poor Communication
May	0	4 x1 – Good Communication x3 – Helpful Staff	2 Poor Communication
Jun	3 Poor Communication	4 x2 – Good Communication x2 – Helpful Staff	7 x1 – Good Communication x4 – Poor Communication x2 – Third party/contracted service supplier