

Appendix C – Proposed development of Key Performance Indicators during 2023/2024

| Activity | Statutory deadline | Current reporting | Proposal |
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| Provide basic scheme information to new joiners | 2 months from date of joining / members request or within 1 month of being provided with 'Job holder information' | No specific KPI but breaches are identified and reported | To introduce a new KPI measured from the date of notification. |
| Inform members who leave the scheme before retirement age of their rights and options | As soon as practical and no more than 2 months from date of initial notification | Measured from the date that all relevant information is received. | To introduce a supplementary KPI measured from date of notification. |
| Inform members who leave the scheme at or after retirement age of the benefits due | Within 1 month of retirement date where the member retires on or after normal pension age or within 2 months of retirement where the member retires before normal pension age | Measured from the date that all relevant information is received. | To introduce a supplementary KPI measured from date of notification. |
| Provide transfer details for transfer in | 2 months from date of request | Measured from the date that all relevant information is received. | To introduce a supplementary KPI measured from date of request. |
| Provide details of transfer value for transfer out | 3 months from date of request | Measured from the date that all relevant information is received. | To introduce a supplementary KPI measured from date of request. |
| Calculate and notify dependant(s) of amount of death benefits | As soon as possible, but in any event no more than 2 months of date or becoming aware of death | Measured from the date that all relevant information is received. | To introduce a supplementary KPI measured from date of death notification. |
| Provide a CETV quotation for divorce purposes | Within 3 months of the request (or shorter deadline as specified in a court order) | Not currently reported on. There is a target in the Administration Strategy. | To introduce a new KPI measured from date of request. |
| Notify implementation information after | Within 21 days of the later of, the date of receipt of the pension sharing order or | Not currently reported on. | To introduce a new KPI measured from the relevant date. |

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| receiving a pension sharing order (and no outstanding information) | the day on which the order takes affect or the date of receipt of the relevant documents / information. | | |
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