

Appendix A – Key Performance Indicators – January, February and March 2023

Function/Task	Indicator	Target	Month	Completed	Within Target	Over Target	% Within Target	RAG	Comments
Notify leavers of deferred benefit entitlement.	Notify leavers of deferred benefit entitlements or concurrent amalgamation within 15 working days of receiving all relevant information.	90%	January February March	301 155 189	283 149 189	18 6 0	94 96 100	Green Green Green	SLA target met SLA target met SLA target met
Payment of retirement benefits from active employment	Notify employees retiring from active membership of benefits award, from date payable or date of receiving all necessary information if later within 5 working days.	95%	January February March	30 18 17	27 18 14	3 0 3	90 100 82	Amber Green Red	SLA target not met* SLA target met SLA target not met*
Payment of pension benefits from deferred membership status.	Notify members retiring from deferred membership status of benefits award, from date payable or date of receiving all necessary information if later within 10 working days.	90%	January February March	53 44 43	48 41 37	5 3 6	91 93 86	Green Green Amber	SLA target met SLA target met SLA target not met**
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	January February March	29 20 28	29 19 28	0 1 0	100 95 100	Green Green Green	SLA target met SLA target met SLA target met
Provide a maximum of one estimate of benefits to employees per year on request	Estimate in agreed format provided within 10 working days from receipt of all information.	80%	January February March	15 38 63	12 33 61	3 5 2	80 5 97	Green Green Green	SLA target met SLA target met SLA target met

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Provide transfer-in quote to scheme member	Letter issued within 10 working days of receipt of all appropriate information.	95%	January February March	66 28 45	66 27 45	0 1 0	100 96 100	Green Green Green	SLA target met SLA target met SLA target met
Payment of transfer out	Process transfer out payment – letter issued within 10 working days of receipt of all information needed to calculate transfer out payment.	90%	January February March	3 20 15	3 19 13	0 1 2	100 95 87	Green Green Amber	SLA target met SLA target met SLA target not met***

*/** Payment of retirement benefits from active employment and payment of pension benefits from deferred membership status – targets missed for January and March due to inexperience within the team and additional training required, this will resolve as the new members become more experienced. In addition, there was one member of the team on long term sick.

***Provide transfer-in quote to scheme member – target missed for March due to a training issue within in the team which is being addressed.

Green: Equal to or above Service Level Agreement (SLA) target.

Amber: If there is a statutory target - below SLA target, but all within statutory target.
If there is no statutory target - below SLA target, but number completed within target is within 10% of the SLA target.

Red: If there is a statutory target - below SLA target and not within statutory target.
If there is no statutory target - below SLA target and number completed within target is not within 10% of the SLA target.