

Appendix A - Key Performance Indicators – February, March & April 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%	February	155	149	6	96	Green	SLA target met
			March	189	189	0	100	Green	SLA target met
			April	181	178	3	98	Green	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%	February	18	18	0	100	Green	SLA target met
			March	17	14	3	82	Red	SLA target not met*
			April	40	36	4	90	Amber	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%	February	44	41	3	93	Green	SLA target met
			March	43	37	6	86	Amber	SLA target not met**
			April	50	47	3	94	Green	SLA target met
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	February	20	19	1	95	Green	SLA target met
			March	28	28	0	100	Green	SLA target met
			April	26	25	1	96	Green	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%	February	38	33	5	87	Green	SLA target met
			March	63	61	2	97	Green	SLA target met
			April	47	44	3	94	Green	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%	February March April	28 45 15	27 45 13	1 0 2	96 100 87	Green Green Amber	SLA target met SLA target met SLA target not 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%	February March April	20 15 2	19 13 2	1 2 0	95 87 100	Green Amber Green	SLA target met SLA target not met*** SLA target met

\* Payment of retirement benefits from active employment – targets missed in March and April due to inexperience within the team and additional training required, this will resolve as newer members become more experienced. There was also a period of long-term sick on the team for the period and in April there was an error on some case review dates following closedown activities which also contributed to the missed target.

\*\* Payment of pension benefits from deferred membership status – target missed in 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/payment of a transfer out – targets missed for March and April due to training issues within the team and reduced checking capacity due to sickness and annual leave.

**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.

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