

Appendix A - Key Performance Indicators – April and May 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%	April	181	178	3	98	Green	SLA target met
			May	203	201	2	99	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%	April	40	36	4	90	Amber	SLA target not met*
			May	46	44	2	96	Green	SLA target 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%	April	50	47	3	94	Green	SLA target met
			May	58	47	11	81	Red	SLA target not met**
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	April	26	25	1	96	Green	SLA target met
			May	36	34	2	94	Amber	SLA target not 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%	April	47	44	3	94	Green	SLA target met
			May	56	49	7	88	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%	April May	15 21	13 21	2 0	87 100	Amber Green	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%	April May	2 9	2 9	0 0	100 100	Green Green	SLA target met SLA target met

*/** Payment of retirement benefits from active employment/payment of pension benefits from deferred membership status – targets missed in April and May due to inexperience within the team and additional training required, this will resolve as newer members become more experienced.

*** Award dependant benefits – target missed for May due to cases not being completed and allocated correctly which resulted in missed SLA targets.

***Provide transfer-in quote to scheme member – target missed for 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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