

Appendix A - Key Performance Indicators – May, June & July 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%	May	203	201	2	99	Green	SLA target met
			June	176	174	2	99	Green	SLA target met
			July	165	164	1	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%	May	46	44	2	96	Green	SLA target met
			June	33	32	1	97	Green	SLA target met
			July	24	18	6	75	Red	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%	May	58	47	11	81	Red	SLA target not met*
			June	61	49	12	80	Amber	SLA target not met*
			July	66	61	5	92	Green	SLA target met
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	May	36	34	2	94	Amber	SLA target not met**
			June	20	20	0	100	Green	SLA target met
			July	32	32	0	100	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%	May	56	49	7	88	Green	SLA target met
			June	64	62	2	97	Green	SLA target met
			July	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%	May	21	21	0	100	Green	SLA target met
			June	46	45	1	98	Green	SLA target met
			July	42	42	0	100	Green	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%	May	9	9	0	100	Green	SLA target met
			June	35	35	0	100	Green	SLA target met
			July	25	25	0	100	Green	SLA target met

* Payment of retirement benefits from active employment/payment of pension benefits from deferred membership status – several contributing factors that led to KPIs being missed for May, June, and July. The team contended with periods of annual leave and sickness over the period and two inexperienced team leaders were receiving training in preparation to replace a leaver and a maternity cover in August. The team itself is inexperienced with ongoing training continuing to be delivered at different levels.

Maternity leave across the wider Operations Team has impacted the ability to divert resources as required due to the back filing of those positions. In addition, following the release of the GAD factors, resource was allocated to clearing the divorce backlog which also sits within this team.

Performance is expected to improve once the training requirements reduce at both officer and team leader level and skills and experience are embedded within the team. The medium to long term plan is for officers to be developed to become multi skilled to help with service resilience across teams.

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

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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