

Appendix A – Pension Service Administration Key Performance Indicators –August, September and October 2023

Function/Task	Indicator	Target	Month	Completed	Within Target	Over Target	% Within Target	RAG	Comments
Notify leavers of deferred benefit entitlements or concurrent amalgamation within 15 working days of receiving all relevant information.		90%	August	156	140	16	90	Green	SLA target met
			September	175	172	3	98	Green	SLA target met
			October	155	153	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%	August	26	17	9	65	Red	SLA target not met*
			September	48	35	13	73	Red	SLA target not met*
			October	35	21	14	60	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%	August	85	64	21	75	Red	SLA target not met*
			September	50	36	14	72	Red	SLA target not met*
			October	68	48	20	71	Red	SLA target not met*
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	August	18	18	0	100	Green	SLA target met
			September	29	29	0	100	Green	SLA target met
			October	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%	August	50	45	5	90	Green	SLA target met
			September	23	21	2	91	Green	SLA target met
			October	23	15	8	65	Red	SLA target not 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%	August	17	17	0	100	Green	SLA target met
			September	22	20	2	91	Amber	SLA target not met**
			October	23	23	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%	August	37	36	1	97	Green	SLA target met
			September	23	22	1	96	Green	SLA target met
			October	13	12	1	92	Green	SLA target met

* Payment of retirement benefits from active employment/payment of pension benefits from deferred membership status/provide a maximum of one estimate of benefits to employees per year on request – several contributing factors that led to KPIs being missed for August, September and October. The team contended with periods of annual leave and sickness 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. In addition, the implementation of the McCloud remedy has increased workloads and queries.

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 a divorce backlog.

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 to increase multi skilling to help with service resilience across teams.

For additional context, the average number of days for processing retirements from active status is 6.6 days.

** Provide transfer-in quote to scheme member – two cases were not processed in time leading to a missed KPI target for September. This was due to the volume of work within the team during a period of team leader annual leave.

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

Amber: Below SLA target, but number completed within target is within 10% of the SLA target.

Red: Below SLA target and number completed within target is not within 10% of the SLA target.

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