Function/Task	Indicator	Month	% Within Target	Comments
Provide basic scheme information to new joiners.	2 months from date of joining or member's request.	July August September October	60 75 77 89	The Pension Service is 100% within target for meeting the SLA of 2 months from the record being created on Altair which is dependent upon the receipt of the employer i-connect file.
Provide transfer details for transfer in.	2 months from date of request.	July August September October	61 73 77 55	Analysis has not been carried out but reasons why the cases would not be completed within the statutory target are: • Interfund in - Further information is required from the previous LGPS pension fund. • Transfer in – Further information is required from the member, the previous scheme, or the employer.
Provide details of transfer value for transfer out.	3 months from date of request.	July August September October	84 91 76 100	Analysis has not been carried out but reasons why the cases would not be completed within the statutory target are: • Interfund out - Further information is required from the employer prior to finalising the deferred benefit and there is a backlog in these cases due to the volumes. • Transfer in – Further information is required from the employer prior to finalising the deferred benefit.
Provide a CETV quotation for divorce purposes.	Within 3 months of the request (or shorter deadline as specified in a court order).	July August September October	100 100 100 95	Cases were not within the statutory target in October as a result of a backlog in checking being cleared in this month. The backlog was created from the clearance of cases that were on hold as a result of the GAD factor changes.

Appendix B – Customer Journey Key Performance Indicators (statutory) for the Period 1 July to 31 October 2023

Function/Task	Indicator	Month	% Within Target	Comments
Inform members who leave the scheme before retirement age of their rights and options.	As soon as practical and no more than 2 months of leaving.			This KPI still needs to be developed.
Inform members who leave the scheme at or after retirement age of the benefits due.	Within 2 months of retirement date where the member **retires before** normal pension age.			Initial data in this area has been variable over the 4-month period and further information is required to understand the fluctuations and validity of the data.
Inform members who leave the scheme at or after retirement age of the benefits due.	Within 1 month of retirement date where the member retires **on or after normal pension age.**			Initial data in this area has been variable over the 4-month period and further information is required to understand the fluctuations and validity of the data.
Calculate and notify dependant(s) of amount of death benefits.	As soon as possible, but in any event no more than 2 months of date or becoming aware of death.			A new death process is due to be created to enable reporting on this KPI. This is not currently possible as a separate case is set up on the member and the dependant.

Function/Task	Indicator	Month	% Within Target	Comments
Notify implementation information after receiving a pension sharing order (and no outstanding information)	Within 21 days of the later of, the date of receipt of the pension sharing order or the day on which the order takes affect or the date of receipt of the relevant documents / information.			This KPI still needs to be developed for the small number of cases that are completed in a year.