

Appendix A – Pension Service Administration Key Performance Indicators – October, November & December 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%	October	155	153	2	99	Green	SLA target met
			November	166	158	8	95	Green	SLA target met
			December	103	95	8	92	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%	October	35	21	14	60	Red	SLA target not met*
			November	40	36	4	90	Amber	SLA target not met*
			December	17	14	3	82	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%	October	68	48	20	71	Red	SLA target not met*
			November	95	86	9	91	Green	SLA target met
			December	48	45	3	94	Green	SLA target met
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	October	26	25	1	96	Green	SLA target met
			November	38	37	1	97	Green	SLA target met
			December	30	30	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%	October	23	15	8	65	Red	SLA target not met*
			November	21	14	7	67	Red	SLA target not met*
			December	15	12	3	80	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%	October	23	23	0	100	Green	SLA target met
			November	19	17	2	89	Amber	SLA target not met**
			December	29	29	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%	October	13	12	1	92	Green	SLA target met
			November	44	43	1	98	Green	SLA target met
			December	47	46	1	98	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 – across October, November and December targets were missed due to ongoing training at team leader level and the impact of the McCloud remedy creating additional workloads. In addition, in December there was a high level of sickness across both Team Leader and Pension Officer levels.

Performance is expected to improve once the training requirements reduce at 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.

The payment of retirement benefits from active employment target is 10 working days from January 2024 as agreed by the Pension Committee, this will also alleviate pressure in this area going forwards.

** Provide transfer-in quote to scheme member – For November the target was missed on 2 cases, one was due to the notification being sent late and the other was delayed at the checking stage. The issues have been picked up within the team.

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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