Appendix A – Pension Service Administration Key Performance Indicators –November & December 2023 and January 2024

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%	November December January	166 103 171	158 95 166	8 8 5	95 92 97	Green Green Green	SLA target met SLA target met 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 10 working days (from January, previously 5).	95%	November December January	40 17 32	36 14 31	4 3 1	90 82 97	Amber Red Green	SLA target not met* SLA target not met* 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%	November December January	95 48 65	86 45 63	9 3 2	91 94 97	Green Green Green	SLA target met SLA target met SLA target met
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	November December January	38 30 32	37 30 32	1 0 0	97 100 100	Green Green Green	SLA target met SLA target met SLA target met
Provide a maximum of one estimate of benefits to employees per	Estimate in agreed format provided within 10 working days from receipt of all information.	80%	November December January	21 15 37	14 12 24	7 3 13	67 80 65	Red Green Red	SLA target not met* SLA target met SLA target not met*

year on request.									
Provide transfer-in quote to scheme member.	Letter issued within 10 working days of receipt of all appropriate information.	95%	November December January	19 29 31	17 29 30	2 0 1	89 100 97	Amber Green Green	SLA target not met** SLA target met 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%	November December January	44 47 32	43 46 32	1 1 0	98 98 100	Green Green Green	SLA target met SLA target met SLA target met

* Payment of retirement benefits from active employment/provide a maximum of one estimate of benefits to employees per year on request – several contributing factors that led to KPIs being missed for November, December and January 2024. The team contended with periods of annual leave and sickness at both Team Leader and Pension Officer level (for context there were 79.5 sickness days for the period). 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.

** In November, the performance was below target for providing a transfer-in quote to scheme members. In both cases 2 days over target, one due to a notification being sent late and one was overdue at checking by 2 days as a recalculation was processed on the target date. These issues have been picked up within the team to prevent recurrence.

Training and resources have been allocated to cases where payment of benefits was required as priority cases. Additional time will be dedicated to estimate cases as resources stabilise. Sickness levels are being addressed through absence management procedures.

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.

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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.