Appendix A – Pension Service Administration Key Performance Indicators – January and February 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%	January February	171 134	166 127	5 7	97 95	Green Green	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.	95%	January February	32 28	31 24	1 4	97 86	Green Amber	SLA target met 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%	January February	65 58	63 53	2 5	97 91	Green Green	SLA target met SLA target met
Award dependant benefits.	Issue award within 5 working days of receiving all necessary information.	95%	January February	32 29	32 28	0 1	100 97	Green Green	SLA target met 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%	January February	37 59	34 31	13 28	65 53	Red Red	SLA target not met SLA target not met

Provide transfer-in quote to scheme member.	Letter issued within 10 working days of receipt of all appropriate information.	95%	January February	31 29	30 29	1 0	97 100	Green Green	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%	January February	32 21	32 21	0 0	100 100	Green Green	SLA target met SLA target met

Targets were missed for providing an estimate of benefits in January and February as a result of high levels of sickness creating a backlog of higher priority cases.

A Target was missed in February for notifying employees retiring from active membership of a benefits award, one case was due to the notification sending being sent late and the other 3 cases were delayed at the checking stage. These issues have been picked up within the team to prevent recurrence.

Performance is expected to improve once the sickness levels have reduced and as skills and experience continue to be embedded within the team. We continue to increase multi skilling to help with service resilience across teams.

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.