Appendix A - Key Performance Indicators – 1 June to 30 September 2021

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%	June	142	133	9	93	Green	SLA target met
			July	116	113	3	97	Green	SLA target met
			August	138	126	12	91	Green	SLA target met
			September	83	74	9	89	Amber	SLA target not 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%	June	34	31	3	91	Amber	SLA target not met
			July	42	40	2	95	Green	SLA target met
			August	27	23	4	85	Amber	SLA target not met
			September	55	50	5	90	Amber	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%	June	49	36	13	73	Red	SLA target not met
			July	49	36	13	73	Red	SLA target not met
			August	33	24	9	72	Red	SLA target not met
			September	82	62	20	75	Red	SLA target not met
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	June	26	26	0	100	Green	SLA target met
			July	26	26	0	100	Green	SLA target met
			August	24	24	0	100	Green	SLA target met
			September	28	28	0	100	Green	SLA target met
Provide a maximum of one estimate of benefits to employees per year on request – Statutory	Estimate in agreed format provided within 10 working days from receipt of all information.	80%	June	60	58	2	96	Green	SLA target met
			July	61	59	2	96	Green	SLA target met
			August	47	47	0	100	Green	SLA target met
			September	21	20	1	95	Green	SLA target met

Appendix A - Key Performance Indicators – 1 June to 30 September 2021

Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	June July August September	37 46 28 18	36 44 28 15	1 2 0 3	97 95 100 83	Green Green Green Amber	SLA target met SLA target met SLA target met SLA target not met
Payment of transfer out – Statutory	Process transfer out payment – letter issued within 10 working days of receipt of all information needed to calculate transfer out payment.	90%	June July August September	10 23 32 21	9 23 29 21	1 0 3 0	90 100 90 100	Green Green Green Green	SLA target met SLA target met SLA target met SLA target met

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

Amber: If there is a statutory target - below SLA target, but all within statutory target.
If there is no statutory target - below SLA target, but number completed within target is within 10% of the SLA target.

Red: If there is a statutory target - below SLA target and not within statutory target.
If there is no statutory target - below SLA target and number completed within target is not within 10% of the SLA target.