

Appendix A - Key Performance Indicators – October, November, December 2021 & January 2022

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	144	124	20	92	Green	SLA target met
			November	101	91	10	90	Green	SLA target met
			December	127	116	11	91	Green	SLA target met
			January	156	152	4	97	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	59	59	0	100	Green	SLA target met
			November	47	46	1	98	Green	SLA target met
			December	30	30	0	100	Green	SLA target met
			January	40	39	1	98	Green	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%	October	51	47	4	92	Green	SLA target met
			November	58	53	5	91	Green	SLA target met
			December	63	58	5	92	Green	SLA target met
			January	33	31	2	94	Green	SLA target met
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	October	37	37	0	100	Green	SLA target met
			November	32	32	0	100	Green	SLA target met
			December	14	14	0	100	Green	SLA target met
			January	22	22	0	100	Green	SLA target met
Provide a maximum of one estimate of benefits to employees per year on	Estimate in agreed format provided within 10 working days from receipt of all information.	80%	October	39	35	4	90	Green	SLA target met
			November	33	31	2	94	Green	SLA target met
			December	45	44	1	100	Green	SLA target met
			January	32	31	1	97	Green	SLA target met

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request – Statutory									
Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	October	54	54	0	100	Green	SLA target met
			November	56	56	0	100	Green	SLA target met
			December	35	34	1	100	Green	SLA target met
			January	15	15	0	100	Green	SLA target 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%	October	8	8	0	100	Green	SLA target met
			November	40	40	0	100	Green	SLA target met
			December	25	25	0	100	Green	SLA target met
			January	32	32	0	100	Green	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.