

Appendix A - Key Performance Indicators – January, February & March 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%	January	156	152	4	97	Green	SLA target met
			February	120	118	2	98	Green	SLA target met
			March	144	143	1	99	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%	January	40	39	1	98	Green	SLA target met
			February	29	29	0	100	Green	SLA target met
			March	33	31	2	94	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%	January	33	31	2	94	Green	SLA target met
			February	39	38	1	97	Green	SLA target met
			March	37	34	3	92	Green	SLA target met
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	January	22	22	0	100	Green	SLA target met
			February	32	32	0	100	Green	SLA target met
			March	37	37	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%	January	32	31	1	97	Green	SLA target met
			February	48	45	3	94	Green	SLA target met
			March	40	37	3	93	Green	SLA target met

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Statutory									
Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	January February March	15 43 39	15 43 39	0 0 0	100 100 100	Green Green Green	SLA target met SLA target met 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%	January February March	32 16 15	32 16 12	0 0 3	100 100 80	Green Green Amber	SLA target met SLA target met SLA target not met**

*Payment of retirement benefits from active employment – KPI marginally missed for March in this area due to work being incorrectly allocated for 2 cases. Going forward regular spot checks will be undertaken to ensure work has been correctly allocated.

**Payment of transfer out – Target missed for March due to a training issue within the team and a change in the payment system for processing transfer out payments. These issues have now been resolved.

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.

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