

Appendix A - Key Performance Indicators – May, June and July 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%	May June July	209 154 146	199 148 139	10 6 7	95 96 95	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 5 working days.	95%	May June July	34 45 29	33 40 28	1 5 1	97 89 97	Green Amber Green	SLA target 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%	May June July	84 44 58	78 40 51	6 4 7	93 91 88	Green Green Amber	SLA target met SLA target met SLA target not met**
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	May June July	35 45 22	35 45 22	0 0 0	100 100 100	Green Green Green	SLA target met SLA target met SLA target met
Provide a maximum of one estimate of benefits to employees per year on request – Statutory	Estimate in agreed format provided within 10 working days from receipt of all information.	80%	May June July	26 34 49	22 31 49	4 3 0	85 91 100	Green Green Green	SLA target met SLA target met SLA target met

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Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	May	26	21	5	81	Amber	SLA target not met***
			June	23	19	4	83	Amber	SLA target not met***
			July	26	26	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%	May	20	18	2	90	Green	SLA target met
			June	14	13	1	93	Green	SLA target met
			July	18	18	0	100	Green	SLA target met

*/** Payment of retirement benefits from active employment/ Payment of pension benefits from deferred membership status – In June and July, there were resourcing issues within the team which resulted in the targets being missed. There were three vacancies and a period of sickness during the period, two of the vacancies have now been filled with one new team member in position for July and the other for September, the remaining vacancy is currently being advertised.

*** Provide transfer-in quote to scheme member – In May and June, the targets were missed due to performance issues within the team, these issues have since been addressed.

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.