

Appendix A - Key Performance Indicators – June, July, August and September 2022.

Function/Task	Indicator	Target	Month	Completed	Within Target	Over Target	% Within Target	RAG	Comments
Notify leavers of deferred benefit entitlements or concurrent amalgamation within 15 working days of receiving all relevant information.		90%	June	154	148	6	96	Green	SLA target met
			July	146	139	7	95	Green	SLA target met
			August	184	176	8	96	Green	SLA target met
			September	152	140	12	92	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%	June	45	40	5	89	Amber	SLA target not met*
			July	29	28	1	97	Green	SLA target met
			August	19	17	2	89	Amber	SLA target not met*
			September	44	41	3	93	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	44	40	4	91	Green	SLA target met
			July	58	51	7	88	Amber	SLA target not met**
			August	57	51	6	89	Amber	SLA target not met**
			September	42	40	2	95	Green	SLA target met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	June	45	45	0	100	Green	SLA target met
			July	22	22	0	100	Green	SLA target met
			August	22	22	0		Green	SLA target met
			September	31	31	0		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%	June	34	31	3	91	Green	SLA target met
			July	49	49	0	100	Green	SLA target met
			August	49	43	6	88	Green	SLA target met
			September	34	34	0	100	Green	SLA target met

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Provide transfer-in quote to scheme member	Letter issued within 10 working days of receipt of all appropriate information.	95%	June	23	19	4	83	Amber	SLA target not met***
			July	26	26	0	100	Green	SLA target met
			August	46	46	0	100	Green	SLA target met
			September	18	18	0	100	Green	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%	June	14	13	1	93	Green	SLA target met
			July	18	18	0	100	Green	SLA target met
			August	26	24	2	92	Green	SLA target met
			September	26	24	2	92	Green	SLA target met

*/ **Payment of retirement benefits from active employment/ Payment of pension benefits from deferred membership status – Across the 4-month period, 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 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.