

Appendix A - Key Performance Indicators – August, September and October 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%	August September October	184 152 183	176 140 180	8 12 3	96 92 98	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%	August September October	19 44 46	17 41 40	2 3 6	89 93 87	Amber Amber Amber	SLA target not met* SLA target not met* 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%	August September October	57 42 75	51 40 68	6 2 7	89 95 91	Amber Green Green	SLA target not met** SLA target met SLA target met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	August September October	22 31 28	22 31 28	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	Estimate in agreed format provided within 10 working days from receipt of all information.	80%	August September October	49 34 46	43 34 42	6 0 4	88 100 91	Green Green Green	SLA target met SLA target met 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%	August	46	46	0	100	Green	SLA target met
			September	18	18	0	100	Green	SLA target met
			October	52	51	1	98	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%	August	26	24	2	92	Green	SLA target met
			September	26	24	2	92	Green	SLA target met
			October	69	63	6	91	Green	SLA target met

\*/ \*\*Payment of retirement benefits from active employment/ Payment of pension benefits from deferred membership status – Over the three month period there were resourcing issues within the team which resulted in targets being missed, there were vacancies and a period of sickness during the period. The resourcing issues have since been addressed and the desired level of experience within the team will be gained over time.

Additionally in October, there was a system issue that resulted in a backlog of checking which also impacted performance for this month.

**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.