

Appendix A – Key performance indicators October, November and December 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	183	180	3	98	Green	SLA target met
			November	186	183	3	98	Green	SLA target met
			December	230	215	15	93	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	46	40	6	87	Amber	SLA target not met*
			November	38	36	2	95	Green	SLA target met
			December	19	19	0	100	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	75	68	7	91	Green	SLA target met
			November	75	72	3	96	Green	SLA target met
			December	44	41	3	93	Green	SLA target met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	October	28	28	0	100	Green	SLA target met
			November	29	29	0	100	Green	SLA target met
			December	24	24	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%	October	46	42	4	91	Green	SLA target met
			November	43	38	5	88	Green	SLA target met
			December	39	35	4	90	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%	October	52	51	1	98	Green	SLA target met
			November	29	26	3	90	Amber	SLA target not met**
			December	47	45	2	96	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%	October	69	63	6	91	Green	SLA target met
			November	24	24	0	100	Green	SLA target met
			December	27	24	3	89	Amber	SLA target not met**

\* Payment of retirement benefits from active employment – the target was missed for October due to a combination of training issues, system issues and resourcing within the team. As a result, additional training has been delivered and two additional staff members have been recruited to support the team following a period of training.

\*\* Provide transfer-in quote to scheme member (November) & payment of transfer out (December) – the respective targets were missed due to recalculations not being allocated and prioritised accordingly. The team has been reminded to highlight any additional checking required to ensure targets are 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.