

Appendix 1 - Key Performance Indicators – Pensions Service May, June & 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	231 242 159	220 235 150	11 7 9	95 97 94	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	68 55 33	65 51 33	3 4 0	96 93 100	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	95 72 42	86 65 39	9 7 3	91 90 93	Green Green Green	SLA target met SLA target met SLA target met
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	May June July	40 30 31	38 30 29	2 0 2	95 100 94	Green Green Amber	SLA target met SLA target met SLA target not 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.	90%	May June July	64 53 52	61 53 51	3 0 1	95 100 98	Green Green Green	SLA target met SLA target met SLA target met

Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	May June July	47 38 18	47 35 18	0 3 0	100 92 100	Green Amber Green	SLA target met SLA target not 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%	May June July	10 11 15	8 8 15	2 3 0	80 73 100	Amber Amber Green	SLA target not met *** SLA target not met *** SLA target met

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

** Award dependant benefits – In July there was a training issue within the team which led to two cases missing the target. The cases related to the same dependant (the deceased member had two periods of employment) and the issue has been addressed.

*** Provide transfer-in quote to scheme member/payment of transfer out - In May and June, targets were missed due to performance issues within the team that issue transfer in and transfer out quotes that 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

