

## Appendix 1 - Key Performance Indicators – Pensions Service February, March and April 2023

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%	February March April	231 177 278	222 172 272	9 5 6	96 97 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%	February March April	20 36 64	19 30 51	1 6 13	95 83 80	Green Red Red	SLA target 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%	February March April	57 72 65	54 65 59	3 7 6	95 90 91	Green Green Green	SLA target met SLA target met SLA target met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	February March April	16 36 21	16 35 21	0 1 0	100 97 100	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.	90%	February March April	45 86 68	43 79 59	2 7 9	96 92 87	Green Green Amber	SLA target met SLA target met SLA target not met**

Provide transfer-in quote to scheme member	Letter issued within 10 working days of receipt of all appropriate information.	95%	February March April	51 40 33	48 39 32	3 1 1	94 98 97	Amber Green Green	SLA target not met*** SLA target met 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%	February March April	19 30 5	18 28 5	1 2 0	95 93 100	Green Green Green	SLA target met SLA target met SLA target met

\* Payment of retirement benefits from active employment – targets missed in March and April due to inexperience within the team and additional training required, this will resolve as newer members become more experienced. There was also a period of long-term sick on the team for the period and in April there was an error on some case review dates following closedown activities which also contributed to the missed target.

\*\* Provide a maximum of one estimate of benefits to employees per year on request – target missed in April due to inexperience within the team and additional training required, this will resolve as the new members become more experienced. In addition, there was one member of the team on long term sick.

\*\*\*Provide transfer-in quote to scheme member – target missed for February due to a training issue within in the team which has 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

