

# Appendix 1 - Key Performance Indicators – Pensions Service January, February and March 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%	January February March	156 149 195	150 148 192	6 1 3	96 99 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%	January February March	44 40 50	44 40 48	0 0 2	100 100 96	Green Green Green	SLA target met SLA target 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%	January February March	57 51 73	52 47 67	5 4 6	91 92 92	Green Green Green	SLA target met SLA target met SLA target met
Award dependant benefits – <b>Statutory</b>	Issue award within 5 working days of receiving all necessary information.	95%	January February March	29 15 36	29 15 35	0 0 1	100 100 97	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 – <b>Statutory</b>	Estimate in agreed format provided within 10 working days from receipt of all information.	90%	January February March	41 59 55	40 55 49	1 4 6	98 93 89	Green Green Amber	SLA target met SLA target met SLA target not met*

Provide transfer-in quote to scheme member – <b>Statutory</b>	Letter issued within 10 working days of receipt of all appropriate information.	95%	January February March	19 45 39	19 45 39	0 0 0	100 100 100	Green Green Green	SLA target met SLA target met SLA target met
Payment of transfer out – <b>Statutory</b>	Process transfer out payment – letter issued within 10 working days of receipt of all information needed to calculate transfer out payment.	90%	January February March	29 10 24	27 10 24	2 0 0	93 100 100	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 – March target marginally missed in this area due to training issues and notifications not being sent out on time. Going forward all notifications in relation to this area of work will be issued by the person checking the estimate.

**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

