

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	123	117	6	95	Green	SLA target met
			March	150	140	10	93	Green	SLA target met
			April	137	129	8	94	Green	SLA target met
			May	84	76	8	90	Green	SLA target met
			June	195	183	12	93	Green	SLA target met
			July	116	116	0	100	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%	February	47	47	0	100	Green	SLA target met
			March	37	35	2	95	Green	SLA target met
			April	28	26	2	93	Amber	SLA target not met
			May	53	52	1	98	Green	SLA target met
			June	55	51	4	92	Amber	SLA target not met
			July	54	53	1	98	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%	February	54	54	0	100	Green	SLA target met
			March	52	52	0	100	Green	SLA target met
			April	50	36	14	72	Amber	SLA target not met ¹
			May	65	40	25	61	Red	SLA target not met ¹
			June	57	47	10	82	Red	SLA target not met ¹
			July	56	41	15	73	Red	SLA target not met ¹
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	February	29	29	0	100	Green	SLA target met
			March	45	42	3	93	Amber	SLA target not met
			April	47	47	0	100	Green	SLA target met
			May	26	25	1	96	Green	SLA target met
			June	38	38	0	100	Green	SLA target met
			July	41	41	0	100	Green	SLA target 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%	February	61	58	3	95	Green	SLA target met
			March	74	73	1	98	Green	SLA target met
			April	50	47	3	94	Green	SLA target met
			May	63	63	0	100	Green	SLA target met
			June	64	63	1	98	Green	SLA target met
			July	56	56	0	100	Green	SLA target met

Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	February	30	25	5	83	Red	SLA target not met ²
			March	33	27	6	81	Red	SLA target not met ²
			April	51	46	5	90	Red	SLA target not met ²
			May	41	41	0	100	Green	SLA target met
			June	57	57	0	100	Green	SLA target met
			July	48	47	1	97	Green	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%	February	6	6	0	100	Green	SLA target met
			March	29	27	2	93	Green	SLA target met
			April	15	15	0	100	Green	SLA target met
			May	45	42	3	93	Green	SLA target met
			June	23	23	0	100	Green	SLA target met
			July	21	21	0	100	Green	SLA target 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.

¹ Payment of pension benefits from deferred membership status – From April, staff resource issues in this area has impacted performance with additional pressure of increases in active retirements and estimate requests. There is now a new team member to help address the workload, once the member is fully trained it is expected that performance will improve.

² Provide transfer-in quote to scheme member – During February to April there was an issue with staff performance in this area, this issue has now been resolved