

# Appendix 1 - Key Performance Indicators – Pensions Service January, February and March 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%	January February March	342 231 177	306 222 172	36 9 5	89 96 97	Amber Green Green	SLA target not 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	31 20 36	28 19 30	3 1 6	90 95 83	Amber Green Red	SLA target not met** SLA target 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%	January February March	75 57 72	70 54 65	5 3 7	93 95 90	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%	January February March	34 16 36	34 16 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	Estimate in agreed format provided within 10 working days from receipt of all information.	90%	January February March	21 45 86	21 43 79	0 2 7	100 96 92	Green Green Green	SLA target met SLA target met SLA target met

Provide transfer-in quote to scheme member	Letter issued within 10 working days of receipt of all appropriate information.	95%	January	34	33	1	97	Green	SLA target met
			February	51	48	3	94	Amber	SLA target not met***
			March	40	39	1	98	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%	January	18	17	1	94	Green	SLA target met
			February	19	18	1	95	Green	SLA target met
			March	30	28	2	93	Green	SLA target met

\*Notify leavers of deferred benefit entitlement – target missed for January due to additional training required for four new members of staff and as a result an increased volume of cases to check. This will resolve as the new members become more experienced.

\*\* Payment of retirement benefits from active employment – targets missed for January and March 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 is being 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

