

Appendix 1 - Key Performance Indicators – Pensions Service October, November & December 2021, January 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%	October	127	118	9	93	Green	SLA target met
			November	156	141	15	90	Green	SLA target met
			December	163	159	4	98	Green	SLA target met
			January	156	150	6	96	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%	October	49	48	1	98	Green	SLA target met
			November	57	57	0	100	Green	SLA target met
			December	41	39	2	95	Green	SLA target met
			January	44	44	0	100	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%	October	48	43	5	90	Green	SLA target met
			November	81	74	7	91	Green	SLA target met
			December	70	69	1	99	Green	SLA target met
			January	57	52	5	91	Green	SLA target met
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	October	24	24	0	100	Green	SLA target met
			November	23	23	0	100	Green	SLA target met
			December	18	18	0	100	Green	SLA target met
			January	29	29	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%	October	41	41	0	100	Green	SLA target met
			November	50	46	4	92	Green	SLA target met
			December	41	41	0	100	Green	SLA target met
			January	41	40	1	98	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%	October	32	32	0	100	Green	SLA target met
			November	65	65	0	100	Green	SLA target met
			December	29	28	1	97	Green	SLA target met
			January	19	19	0	100	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%	October	13	13	0	100	Green	SLA target met
			November	36	36	0	100	Green	SLA target met
			December	33	33	0	100	Green	SLA target met
			January	29	27	2	93	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

