

Appendix 1 - Key Performance Indicators – Pensions Service November, December 2022 and January 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%	November December January	281 272 342	273 244 306	8 28 36	97 90 89	Green Green Amber	SLA target met SLA target met SLA target not 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%	November December January	52 32 31	46 31 28	6 1 3	88 97 90	Amber Green Amber	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%	November December January	92 95 75	89 90 70	3 5 5	97 95 93	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%	November December January	39 25 34	39 25 34	0 0 0	100 100 100	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	Estimate in agreed format provided within 10 working days from receipt of all information.	90%	November December January	69 31 21	63 28 21	6 3 0	91 90 100	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%	November December January	48 66 34	48 65 33	0 1 1	100 98 97	Green Green Green	SLA target 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%	November December January	57 18 18	57 17 17	0 1 1	100 94 94	Green Green Green	SLA target met SLA target met 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 were missed for November and January due to inexperience within the team and additional training required. This will resolve as the new members become more experienced.

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

