Appendix 1 – Pension Service Key Performance Indicators for November, December 2023 and January 2024

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	214 153 220	197 146 211	17 7 9	92 95 96	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 10 working days (from January, previously 5).	95%	November December January	49 37 35	41 30 35	8 7 0	84 81 100	Red Red Green	SLA target not met* SLA target not 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%	November December January	102 79 68	90 70 66	12 9 2	88 89 97	Amber Amber Green	SLA target not met* SLA target not met* SLA target met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	November December January	41 35 25	39 34 21	2 1 4	95 97 84	Green Green Amber	SLA target met SLA target met SLA target not met**

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Function/Task	Indicator	Target	Month	Completed	Within Target	Over Target	% Within Target	RAG	Comments
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	29 16 31	14 11 13	15 5 18	48 69 42	Red Red Red	SLA target not met* SLA target not met* SLA target not met*
Provide transfer-in quote to scheme member	Letter issued within 10 working days of receipt of all appropriate information.	95%	November December January	31 35 44	29 34 44	2 1 0	94 97 100	Amber Green Green	SLA target not 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	46 94 34	46 91 34	0 3 0	100 97 100	Green Green Green	SLA target met SLA target met SLA target met

* Payment of retirement benefits from active employment/payment of pension benefits from deferred membership status/ provide a maximum of one estimate of benefits to employees per year on request –   several contributing factors that led to KPIs being missed for November, December and January 2024. The team contended with periods of annual leave and sickness at both Team Leader and Pension Officer level (for context there were 79.5 sickness days for the period). The team itself is inexperienced with ongoing training continuing to be delivered at different levels. In addition, the implementation of the McCloud remedy has increased workloads and queries.

** In January the performance was below target for the processing of dependant benefits, the four missed cases were due to the notification task being finalised late. This has been raised within the team to prevent recurrence.

Training and resources had been allocated to cases where a benefit was due. Additional time will be dedicated to estimate cases as resources stabilise. Sickness levels are being addressed through absence management procedures.

Performance is expected to improve once the training requirements reduce at both officer and team leader level and skills and experience are embedded within the team. The medium to long term plan is to increase multi skilling to help with service resilience across teams.

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Green: Equal to or above Service Level Agreement (SLA) target.

Amber: Below SLA target, but number completed within target is within 10% of the SLA target.

Red: Below SLA target and number completed within target is not within 10% of the SLA target.