

Pension Service Key Performance Indicators for August and September 2024

Function/Task	Indicator	Minimum Service Level	Month	Total cases completed	Cases completed within the minimum Service Level	Cases completed under the minimum Service Level	% completed within the minimum Service Level	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%	August September	199 184	182 162	17 22	91 88	Green Amber	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 10 working days (from January, previously 5).	95%	August September	34 67	34 65	0 2	100 97	Green Green	SLA target 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%	August September	92 87	90 75	2 12	98 86	Green Amber	SLA target met SLA target not met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	August September	15 19	15 18	0 1	100 95	Green Green	SLA target met SLA target 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%	August	39	23	16	59	Red	SLA target not met
			September	38	14	24	37	Red	SLA target not met
Provide transfer-in quote to scheme member	Letter issued within 10 working days of receipt of all appropriate information.	95%	August	23	23	0	100	Green	SLA target met
			September	19	19	0	0	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%	August	15	15	0	100	Green	SLA target met
			September	58	58	0	0	Green	SLA target met

- 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.