

# Appendix 1 - Key Performance Indicators – Pensions Service August, September and October 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%	August September October	194 186 154	187 169 151	7 17 3	96 91 98	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 5 working days.	95%	August September October	40 58 56	37 55 51	3 3 5	93 95 91	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%	August September October	69 73 158	62 69 144	7 4 14	90 95 91	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%	August September October	23 29 42	23 29 42	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%	August September October	30 40 73	27 40 70	3 0 3	90 100 96	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%	August September October	33 21 34	33 20 34	0 1 0	100 1 100	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%	August September October	36 40 42	35 38 38	1 2 4	97 95 90	Green Green Green	SLA target met SLA target met SLA target met

\* Payment of retirement benefits from active employment – In August, there were resourcing issues within the team which resulted in the target being missed, there were vacancies and a period of sickness during this period. In October, the target was also missed due to a system issue resulting in a backlog of checking and remaining resource issues. The resourcing issues have since been address and the desired level of experience within the team will be gained over time.

**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.

