

Appendix 1 - Key Performance Indicators – Pensions Service March to May 2021

Function/Task	Indicator	Target	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%	March: 150 April: 137 May: 84	140 129 76	10 8 8	93 94 90	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%	March: 37 April: 28 May: 53	35 26 52	2 2 1	95 93 98	Green Amber Green	SLA target met SLA target not met ¹ 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%	March: 52 April: 50 May: 65	52 36 40	0 14 25	100 72 61	Green Amber Red	SLA target met SLA target not met ¹ SLA target not met ¹
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	March: 45 April: 47 May: 26	42 47 25	3 0 1	93 100 96	Amber Green Green	SLA target not met ² SLA target met 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%	March: 74 April: 50 May: 63	73 47 63	1 3 0	98 94 100	Green Green Green	SLA target met SLA target met SLA target met
Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	March: 33 April: 51 May: 41	27 46 41	6 5 0	81 90 100	Red Red Green	SLA target not met ³ SLA target not met ³ 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%	March: 29 April: 15 May: 45	27 15 42	2 0 3	93 100 93	Green Green Green	SLA target met SLA target met 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

¹ A number of Retirement KPIs have been impacted by the revoked exit cap changes, unitary changes including Tier 1-3 consultation, and bulk communications leading to increased general enquiries into the team. Staff have been temporarily reassigned within the service to manage the increased demand.

² Award dependant benefits – Delays at checking stage now resolved.

³ Transfer in/transfer out – Staff performance issues now resolved

