

Appendix 2 – KPI Analysis for February 2018								
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%	297	297	0	100%	G	SLA target met.
Payment of retirement benefits from active employment.	Payment of lump sum within 5 working days of payable date or date of receiving all necessary information if later. First pension paid in the month of leaving or in month of receiving all necessary information if later.	95%	20	19	1	95%	G	SLA target met.
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	21	21	0	100%	G	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%	67	62	5	92%	G	SLA target met.
Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	10	10	0	100%	G	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%	10	10	0	100%	G	SLA target met.

Green:

- Equal to or above 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.