Appendix 1 – Pension Service Key Performance Indicators for August, September and October 2023

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	247 213 181	232 213 178	15 0 3	94 100 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	42 49 49	31 38 33	11 11 16	74 78 67	Red Red Red	SLA target not met* SLA target not 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	86 82 80	59 66 65	27 16 15	69 80 81	Red Amber Amber	SLA target not met* SLA target not met* SLA target not met*
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	August September October	23 41 31	22 40 31	1 1 0	96 98 100	Green Green Green	SLA target met 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 September October	32 30 16	25 25 12	7 5 4	78 83 75	Red Amber 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%	August September October	21 25 25	21 25 25	0 0 0	100 100 100	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	44 34 14	42 33 14	2 1 0	95 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 August, September and October. The team contended with periods of annual leave and sickness and two inexperienced team leaders were receiving training in preparation to replace a leaver and a maternity cover in August. 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.

Maternity leave across the wider Operations Team has impacted the ability to divert resources as required due to the back filing of those positions. In addition, following the release of the GAD factors, resource was allocated to clearing a divorce backlog.

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.

For additional context, the average number of days for processing retirements from active status is 6.4 days.

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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.