

Item 4 - Appendix 1 – Pension Service Key Performance Indicators for April to July 2024

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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%	April	197	193	4	98	Green	SLA target met
			May	196	184	12	94	Green	SLA target met
			June	259	253	6	98	Green	SLA target met
			July	229	216	13	94	Green	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 10 working days (from January, previously 5).	95%	April	49	48	1	98	Green	SLA target met
			May	36	35	1	97	Green	SLA target met
			June	52	51	1	98	Green	SLA target met
			July	41	39	2	95	Green	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%	April	83	71	12	86	Amber	SLA target not met*
			May	83	79	4	95	Green	SLA target met
			June	90	80	10	89	Amber	SLA target not met*
			July	95	87	8	92	Green	SLA target met
Award dependant benefits	Issue award within 5 working days of receiving all necessary information.	95%	April	28	26	2	93	Amber	SLA target not met*
			May	31	28	3	90	Amber	SLA target not met*
			June	27	27	0	100	Green	SLA target met
			July	24	21	3	88	Amber	SLA target not 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%	April	30	20	10	67	Red	SLA target not met*
			May	48	21	27	44	Red	SLA target not met*
			June	31	16	15	52	Red	SLA target not met*
			July	53	28	25	53	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%	April	20	19	1	95	Green	SLA target met
			May	23	20	3	87	Amber	SLA target not met*
			June	26	24	2	92	Amber	SLA target not met*
			July	23	22	1	96	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%	April	17	14	3	82	Amber	SLA target not met*
			May	10	10	0	100	Green	SLA target met
			June	6	6	0	100	Green	SLA target met
			July	31	29	2	94	Green	SLA target met

There were eight amber KPIs for the period, three on awarding dependent benefits (April, May, July), two in relation to the payment of pension benefits from deferred membership status (April and June), two in relation to providing transfer in quotes to members (May and June) and one in relation to the payment out of transfers (April). In addition to ongoing issues, some cases were missed due to incorrect allocation and prioritisation of cases which was picked up within the team and for July all KPIs in those areas reverted back to green except for one.

During the period there were four red KPIs on providing a maximum of one estimate of benefits to employees per year on request with the team currently focusing on working through the backlog that has been created, however, the clearance of the backlog has also been impacted by the ongoing issues, particularly the heightened sickness levels.

The approved additional posts within the Business Plan have now all been recruited to with the exception of one Officer vacancy, although there may be a period of short-term additional pressure whilst skills and knowledge are obtained the long-term benefits are expected to help alleviate pressures.

**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.

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Red: Below SLA target and number completed within target is not within 10% of the SLA target.