

Appendix 1 - Key Performance Indicators – Pensions Service June to September 2021

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%	June July August September	195 116 146 109	183 116 138 98	12 0 8 11	93 100 94 89	Green Green Green Amber	SLA target met SLA target met SLA target met SLA target not 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%	June July August September	55 54 36 76	51 53 29 71	4 1 7 5	92 98 80 93	Amber Green Red Amber	SLA target not met ¹ SLA target met SLA target not met ¹ SLA target not met ¹
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%	June July August September	57 56 82 99	47 41 50 82	10 15 32 17	82 73 60 82	Red Red Red Red	SLA target not met ² SLA target not met ² SLA target not met ² SLA target not met ²
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	June July August September	38 41 33 31	38 41 33 31	0 0 0 0	100 100 100 100	Green Green Green Green	SLA target met SLA target met 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%	June July August September	64 56 30 27	63 56 28 24	1 0 2 3	98 100 93 88	Green Green Green Amber	SLA target met SLA target met SLA target met SLA target not met
Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	June July August September	57 48 23 18	57 47 22 16	0 1 1 2	100 97 95 88	Green Green Green Amber	SLA target met SLA target met SLA target met SLA target not 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%	June	23	23	0	100	Green	SLA target met
			July	21	21	0	100	Green	SLA target met
			August	31	30	1	96	Green	SLA target met
			September	14	14	0	100	Green	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.

