

## Key Performance Indicators – Pensions Service June, July, August and September 2022

| 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<br>July<br>August<br>September | 242<br>159<br>194<br>186 | 235<br>150<br>187<br>169 | 7<br>9<br>7<br>17 | 97<br>94<br>96<br>91    | Green<br>Green<br>Green<br>Green | SLA target met<br>SLA target met<br>SLA target met<br>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%    | June<br>July<br>August<br>September | 55<br>33<br>40<br>58     | 51<br>33<br>37<br>55     | 4<br>0<br>3<br>3  | 93<br>100<br>93<br>95   | Amber<br>Green<br>Amber<br>Green | SLA target not met*<br>SLA target met<br>SLA target not met*<br>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%    | June<br>July<br>August<br>September | 72<br>42<br>69<br>73     | 65<br>39<br>62<br>69     | 7<br>3<br>7<br>4  | 90<br>93<br>90<br>95    | Green<br>Green<br>Green<br>Green | SLA target met<br>SLA target met<br>SLA target met<br>SLA target met           |
| Award dependant benefits   | Issue award within 5 working days of receiving all necessary information.  | 95%    | June<br>July<br>August<br>September | 30<br>31<br>23<br>29     | 30<br>29<br>23<br>29     | 0<br>2<br>0<br>0  | 100<br>94<br>100<br>100 | Green<br>Amber<br>Green<br>Green | SLA target met<br>SLA target not met**<br>SLA target met<br>SLA target met     |
| 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%    | June<br>July<br>August<br>September | 53<br>52<br>30<br>40     | 53<br>51<br>27<br>40     | 0<br>1<br>3<br>0  | 100<br>98<br>90<br>100  | Green<br>Green<br>Green<br>Green | SLA target met<br>SLA target met<br>SLA target met<br>SLA target met           |

|  |   |     |           |    |    |   |     |       |                       |
|--|---|-----|-----------|----|----|---|-----|-------|-----------------------|
| Provide transfer-in quote to scheme member | Letter issued within 10 working days of receipt of all appropriate information.   | 95% | June      | 38 | 35 | 3 | 92  | Amber | SLA target not met*** |
|  |   |     | July      | 18 | 18 | 0 | 100 | Green | SLA target met        |
|  |   |     | August    | 33 | 33 | 0 | 100 | Green | SLA target met        |
|  |   |     | September | 21 | 20 | 1 | 1   | 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% | June      | 11 | 8  | 3 | 73  | Amber | SLA target not met*** |
|  |   |     | July      | 15 | 15 | 0 | 100 | Green | SLA target met        |
|  |   |     | August    | 36 | 35 | 1 | 97  | Green | SLA target met        |
|  |   |     | September | 40 | 38 | 2 | 95  | Green | SLA target met        |
|  |   |     |           |    |    |   |     |       |                       |

\* Payment of retirement benefits from active employment – In June and August there were resourcing issues within the team which resulted in targets being missed. There were three vacancies and a period of sickness during the period, there is currently one remaining vacancy being advertised.

\*\* Award dependant benefits - In July there was a training issue within the team which led to two cases missing the target. The cases related to the same dependant (the deceased member had two periods of employment) and the issue has been addressed.

\*\*\*Provide transfer-in quote to scheme member/payment of transfer out – In June, targets were missed due to performance issues within the team that issue transfer in and transfer out quotes that have since been addressed.

**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.

