

Appendix 1 - Key Performance Indicators – Pensions Service February, March and April 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%	February	149	148	1	99	Green	SLA target met
			March	195	192	3	98	Green	SLA target met
			April	157	153	4	97	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 5 working days.	95%	February	40	40	0	100	Green	SLA target met
			March	50	48	2	96	Green	SLA target met
			April	36	36	0	100	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%	February	51	47	4	92	Green	SLA target met
			March	73	67	6	92	Green	SLA target met
			April	60	57	3	95	Green	SLA target met
Award dependant benefits – Statutory	Issue award within 5 working days of receiving all necessary information.	95%	February	15	15	0	100	Green	SLA target met
			March	36	35	1	97	Green	SLA target met
			April	34	34	0	100	Green	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%	February	59	55	4	93	Green	SLA target met
			March	55	49	6	89	Amber	SLA target not met*
			April	40	40	0	100	Green	SLA target met

Provide transfer-in quote to scheme member – Statutory	Letter issued within 10 working days of receipt of all appropriate information.	95%	February	45	45	0	100	Green	SLA target met
			March	39	39	0	100	Green	SLA target met
			April	15	15	0	100	Green	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%	February	10	10	0	100	Green	SLA target met
			March	24	24	0	100	Green	SLA target met
			April	24	20	4	83	Amber	SLA target not met**

* Provide a maximum of one estimate of benefits to employees per year on request – March target marginally missed in this area due to training issues and notifications not being sent out on time. Going forward all notifications in relation to this area of work will be issued by the person checking the estimate.

** Payment of transfer out – April target missed due to performance issues within the team, there will be closer monitoring of outstanding casework within the team going forward.

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

