

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	195	183	12	93	Green	SLA target met
			July	116	116	0	100	Green	SLA target met
			August	146	138	8	94	Green	SLA target met
			September	109	98	11	89	Amber	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	55	51	4	92	Amber	SLA target not met
			July	54	53	1	98	Green	SLA target met
			August	36	29	7	80	Red	SLA target not met
			September	76	71	5	93	Amber	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%	June	57	47	10	82	Red	SLA target not met
			July	56	41	15	73	Red	SLA target not met
			August	82	50	32	60	Red	SLA target not met
			September	99	82	17	82	Red	SLA target not met
Award dependant benefits – <b>Statutory</b>	Issue award within 5 working days of receiving all necessary information.	95%	June	38	38	0	100	Green	SLA target met
			July	41	41	0	100	Green	SLA target met
			August	33	33	0	100	Green	SLA target met
			September	31	31	0	100	Green	SLA target met
Provide a maximum of one estimate of benefits to employees per year on request – <b>Statutory</b>	Estimate in agreed format provided within 10 working days from receipt of all information.	90%	June	64	63	1	98	Green	SLA target met
			July	56	56	0	100	Green	SLA target met
			August	30	28	2	93	Green	SLA target met
			September	27	24	3	88	Amber	SLA target not met
Provide transfer-in quote to scheme member –	Letter issued within 10 working days of receipt of all appropriate information.	95%	June	57	57	0	100	Green	SLA target met
			July	48	47	1	97	Green	SLA target met
			August	23	22	1	95	Green	SLA target met

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

<b>Statutory</b>			September	18	16	2	88	Amber	SLA target not met
Payment of transfer out – <b>Statutory</b>	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