

Appendix A

KPI Category	Complete at End of Period	Completed Within Customer Target	% Complete Within Customer Target	Completed Within KPI Target	% Complete Within KPI Target	Completed Within Legally Required Response Time	% Complete Within Legal Target
Aggregation - Send notification of aggregation options	350	302	86.3%	302	86.3%	333	95.1%
Deaths – Initial letter acknowledgement death	120	69	57.5%	69	57.5%	118	98.3%
Deaths – Letter notifying amount of dependant’s benefit	95	77	81.1%	77	81.1%	89	93.7%
Deferment – Calculate and notify deferred benefits	294	133	45.2%	133	45.2%	200	68.0%
Deferred into pay – Process and pay lump sum retirement grant	193	112	58.0%	112	58.0%	185	95.9%
Divorce quote – Letter detailing cash equivalent value and other benefits	19	8	42.1%	8	42.1%	16	84.2%
Refund – Process and pay a refund	98	87	88.8%	87	88.8%	98	100.0%
Retirements – Letter notifying actual retirement benefits active	148	137	92.6%	137	92.6%	148	100.0%
Retirements – Letter notifying actual retirement benefits deferred	184	57	31.0%	57	31.0%	179	97.3%
Retirements – Letter notifying estimate of retirement benefits active	128	117	91.4%	117	91.4%	127	99.2%
Retirements – Letter notifying estimate of retirement benefits deferred	49	38	77.6%	38	77.6%	48	98.0%
Retirements – Process and pay lump sum retirement grant active	136	134	98.5%	134	98.5%	136	100.0%
Transfers in – Letter detailing transfer	58	14	24.1%	14	24.1%	40	69.0%
Transfers in – Letter detailing transfer in quote	58	41	70.7%	41	70.7%	57	98.3%
Transfers out – Letter detailing transfer	98	51	52.0%	51	52.0%	76	77.6%
Transfers out – Letter detailing transfer out quote	17	4	23.5%	4	23.5%	8	47.1%
Grand Total	2,086	1,383		1,383		1,893	

Appendix A

Completion Within Review Period - 01/02/2024 to 30/04/2024

