

Appendix A KPI table for the period April 2025 to March 2026

Category	Q1 Complete at End of Period Apr 25 to Jun25	Q2 Complete at End of Period Jul25 to Sep25	Q3 Complete at End of Period Oct25 to Dec25	Q4 Complete at End of Period Jan26 to Mar26	Legal target	Q1 Complete Within Legal Target Apr25 to Jun25	Q2 Complete Within Legal Target Jul25 to Sep25	Q3 Complete Within Legal Target Oct25 to Dec25	Q4 Complete Within Legal Target Jan26 to Mar26
Communication issued with acknowledgement of death of active, deferred, pensioner and dependent member	145	103			2 months	99.3%	93.2%		
Communication issued confirming the amount of dependents pension	96	91			2 months	97.9%	96.7%		
Communication issued to deferred member with pension and lump sum options (quotation)	34	30			2 months	100.0%	100.0%		
Communication issued to active member with pension and lump sum options (quotation)	48	48			2 months	100.0%	100.0%		
Communication issued to deferred member with confirmation of pension and lump sum options (actual)	243	198			2 months	98.4%	93.9%		
Communication issued to active member with confirmation of pension and lump sum options (actual)	102	131			2 months	99.0%	97.7%		
Payment of lump sum (both actives and deferreds)	322	324			2 months	99.1%	98.8%		
Communication issued with deferred benefit options	392	243			2 months	44.9%	57.6%		
Communication issued to scheme member with completion of transfer in	96	54			2 months	66.7%	79.6%		
Communication issued to scheme member with completion of transfer out	69	76			2 months	78.3%	88.2%		
Payment of refund	105	77			2 months	99.0%	98.7%		
Divorce quotation	22	24			2 months	100.0%	95.8%		
Member estimates requested by scheme member and employer	157	134			2 months	93.6%	97.8%		
Aggregation cases	269	375			2 months	89.2%	96.0%		
Grand Total	2100	1908	0	0					