

Appendix A: Existing Reporting Formats

General Workloads

1. The tables show the volumes in each work area during the months October to December 2025.
2. The Pensions Manager has included a RAG rating to each work area to highlight which areas are below target, close to target, or good or better than target.
3. The rating compares the cases that can be processed to the maximum target number of cases at month end. The maximum target is the desired number of cases not to be exceeded. This is designed to assist Officers to identify the work areas that require the greatest immediate attention.

Target	Rating
Below target	▼
Close to target	▶
Good or better than target	▲

October 2025

Area	Cases Completed	Cases Ready for Processing	Maximum target number of cases that can be processed at month end	Rating
Preserved Benefits	51	1341	1,000	▼
Aggregations	177	1580	1,000	▼
Transfers in	102	118	200	▲
Retirement Options	279	136	300	▲
Retirements Paid	252	62	300	▲
Deaths	124	69	200	▲
Pension Estimates	74	60	250	▲

Transfers out (excluding interfunds out) *	13	65	75	▲
Refunds	59	31	204	▲
New starters set up**	632	N/A	N/A	

November 2025

Area	Cases Completed	Cases Ready for Processing	Maximum target number of cases that be processed at month end	Rating
Preserved Benefits	145	1235	1,000	▼
Aggregations	78	1553	1,000	▼
Transfers in	42	130	200	▲
Retirement Options	203	174	350	▲
Retirements Paid	203	51	350	▲
Deaths	106	58	200	▲
Pension Estimates	128	48	250	▲
Transfers out (excluding interfunds out) *	33	62	100	▲
Refunds	60	31	400	▲
New starters set up**	768	N/A	N/A	N/A

December 2025

Area	Cases Completed	Cases Ready for Processing	Maximum target number of cases that be processed at month end	Rating
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Preserved Benefits	47	1345	1,000	▼
Aggregations	132	1494	1,000	▼
Transfers in	22	164	200	▲
Retirement Options	195	109	300	▲
Retirements Paid	200	28	300	▲
Deaths	117	56	200	▲
Pension Estimates	68	54	250	▲
Transfers out (excluding interfunds out) *	23	64	100	▲
Refunds	68	42	400	▲
New starters set up**	947	N/A	N/A	N/A

Key Performance Indicators Quarter XXXXX

Quarter One - 1 April 2025 to 30 June 2025										
Business Process Perspective	Target	This Quarter		Ave.days	Previous Quarter	Customer Perspective - Feedback	Target	This Quarter		Previous Quarter
Retirement Benefits notified to members within 10 working days of paperwork received	92%	88%	▶	N/A	88%	Establish members understanding of info provided - rated at least mainly ok or clear	95%	93%	▶	100%
Pension payments made within 10 working days of receiving election	95%	96%	▲	N/A	95%	Experience of dealing with Section - rated at least good or excellent	95%	90%	▶	89%
Death benefits/payments sent to dependant within 10 working days of notification	90%	79%	▶	8	79%	Establish members thoughts on the amount of info provided - rated as about right	92%	89%	▶	97%
						Establish the way members are treated - rated as polite or extremely polite	97%	99%	▲	98%
Below target	▼					Email response - understandable	95%	100%	▲	100%
Close to target	▶					Email response - content detail	92%	98%	▲	96%
Good or better than target	▲					Email response - timeliness	92%	93%	▲	95%

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