

Appendix D: Proposed Approach for Future Board Reports

Quarter One - 1 April 2026 to 30 June 2026 (figures for illustrative purposes only)

Existing Targets shown as stated, new targets to be confirmed

Business Process Perspective	Target	This Quarter		Ave.days	Previous Quarter	Customer Perspective - Feedback	Target	This Quarter		Previous Quarter
Communication issued with acknowledgement of death of scheme member within 5 days	TBC	100%	▶	N/A	100%	Establish members understanding of info provided - rated at least mainly ok or clear	95%	97%	▲	99%
Death benefits/payments sent to dependant within 10 working days of notification	90%	80%	▼	8	89%	Experience of dealing with Section - rated at least good or excellent	95%	88%	▶	90%
Retirement Benefits notified to members within 10 working days of paperwork received	92%	88%	▶	N/A	94%	Establish members thoughts on the amount of info provided - rated as about right	92%	95%	▲	96%
Pension payments made within 10 working days of receiving election	95%	97%	▲	N/A	96%	Establish the way members are treated - rated as polite or extremely polite	97%	100%	▲	98%
Payment of lump sum (both actives and deferreds) within 15 working days	TBC	84%	▶		88%	Email response - understandable	95%	100%	▲	100%
Communication issued with deferred benefit options within 30 working days	TBC	88%	▲		81%	Email response - content detail	92%	95%	▲	100%
Communication issued to scheme member with completion of transfer in within 15 working days	TBC	95%	▲		92%	Email response - timeliness	92%	91%	▶	96%
Communication issued to scheme member with completion of transfer out within 15 working days	TBC	91%	▲		87%					
Payment of refund within 10 working days	TBC	90%	▶		92%					
Divorce quotation within 45 working days	TBC	98%	▲		96%					
Communication issued within 15 working days following actual divorce proceedings i.e application of a Pension Sharing Order	TBC	95%	▶		98%					
Communication issued to new starters within 40 working days	TBC	100%	▶		100%					
Member estimates requested by scheme member and employer within 15 working days	TBC	89%	▶		94%					

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

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