

Appendix: Key Performance Indicators (Quarter One 1 April - 30 June 2026-2027)

Business Process Perspective	Target	This Quarter		Ave.days	Previous Quarter	Comments
Retirement Benefits notified to members within 10 working days of paperwork received	92%	91%	▼	N/A	95%	No change to this KPI
Pension payments made within 10 working days of receiving election	95%	98%	▲	N/A	98%	No change to this KPI
Death benefits/payments sent to dependant within 10 working days of notification	90%	93%	▲	8	91%	No change to this KPI

Additional KPIs to align with Annual Report

Business Process Perspective	Target	This Quarter		Ave.days	Previous Quarter	Comments
Communication issued with acknowledgement of death of scheme member within 5 days	N/A	97%	N/A	N/A	NEW	
Payment of lump sum (both actives and deferreds) within 15 working days	N/A	99%	N/A	N/A	NEW	Workflow measures to the end of the process, not to date payment is made to the bank account.
Communication issued with deferred benefit options within 30 working days	N/A	29%	N/A	N/A	NEW	Current figures based on the whole process and the reporting approach will be refined to reflect the time taken to issue initial communication only.
Communication issued to scheme member with completion of transfer in within 15 working days	N/A	0%	N/A	N/A	NEW	Excludes Interfunds. Current figures do not fully represent length of time 'out of office' when processing these cases. The reporting approach will be refined to more accurately represent the time taken to process these cases. There was only one transfer in case completed in the quarter.
Communication issued to scheme member with completion of transfer out within 15 working days	N/A	70%	N/A	N/A	NEW	Excludes interfunds. Current figures do not fully represent length of time 'out of office' when processing these cases. The reporting approach will be refined to more accurately represent the time taken to process these cases.
Payment of refund within 10 working days	N/A	89%	N/A	N/A	NEW	
Divorce quotation within 45 working days	N/A	97%	N/A	N/A	NEW	Statutory timeline for this is three months
Communication issued within 15 working days following actual divorce proceedings i.e application of a Pension Sharing Order	N/A	0%	N/A	N/A	NEW	Current figures based on the whole process and the reporting approach will be refined to reflect the time taken to issue initial communication only. Additionally, this is a category with very low numbers and three were completed in quarter one.
Communication issued to new starters within 40 working days	N/A	100%	N/A	N/A	NEW	Based on time taken between creation of new records and monthly distribution of 'Welcome' letters

Member estimates requested by scheme member and employer within 15 working days	N/A	28%	N/A	N/A	NEW	Internal process is to direct users to online account to perform own calculations and expected turnaround times for estimates is 8-10 weeks
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Customer Perspective - Feedback	Target	This Quarter		Previous Quarter	Comments
Establish members understanding of info provided - rated at least mainly ok or clear	95%	91%	▼	100%	No change to this KPI
Experience of dealing with Section - rated at least good or excellent	95%	91%	▼	92%	No change to this KPI
Establish members thoughts on the amount of info provided - rated as about right	92%	94%	▲	93%	No change to this KPI
Establish the way members are treated - rated as polite or extremely polite	97%	99%	▲	100%	No change to this KPI
Email response - understandable	95%	95%	▲	100%	No change to this KPI
Email response - content detail	92%	97%	▲	96%	No change to this KPI
Email response - timeliness	92%	95%	▲	96%	No change to this KPI

Below target	▼
Good or better than target	▲