




















Appendix A

Appendix A

| KPI's for the period 01.04.23 to 30.06.23 | | | | | | | |
|--|-------------|---------------------------|------------------|------------------------|--------------------|--------------------|---------------------|
| WORKTYPE | TOTAL CASES | TARGET DAYS FOR EACH CASE | TARGET MET CASES | MINIMUM TARGET PERCENT | TARGET MET PERCENT | AVERAGE TIME TAKEN | DIRECTION OF TRAVEL |
| Age 55 Increase to Pension | 2 | 20 | 2 | 85 | 100 | 9.5 | ← |
| AVC In-house (General) | 50 | 20 | 50 | 85 | 100 | 1.92 | ← |
| Change of Address | 189 | 20 | 189 | 85 | 100 | 1.77 | ← |
| Change of Bank Details | 74 | 20 | 74 | 85 | 100 | 3.26 | ← |
| Death Grant to Set Up | 26 | 10 | 24 | 85 | 92.31 | 21.15 | ↓ |
| Death In Retirement | 176 | 10 | 155 | 85 | 88.07 | 7.53 | ↑ |
| Death In Service | 3 | 10 | 3 | 85 | 100 | 7 | ↑ |
| Death on Deferred | 11 | 10 | 8 | 85 | 72.73 | 22.27 | ↓ |
| Deferred Benefits Into Payment Actual | 257 | 10 | 247 | 90 | 96.11 | 4.35 | ↓ |
| Deferred Benefits Into Payment Quote | 374 | 35 | 223 | 85 | 59.63 | 37.51 | ↑ |
| Deferred Benefits Set Up on Leaving | 523 | 20 | 347 | 85 | 66.35 | 64.63 | ↓ |
| Dependant Pension To Set Up | 70 | 5 | 61 | 90 | 87.14 | 4.64 | ↓ |
| Divorce Quote | 18 | 40 | 18 | 85 | 100 | 13.83 | ← |
| Estimates for Deferred Benefits into Payment | 4 | 10 | 2 | 90 | 50 | 12.75 | ↓ |
| General Payroll Changes | 148 | 20 | 147 | 85 | 99.32 | 1.91 | ↓ |
| Initial letter Death in Retirement | 176 | 10 | 167 | 85 | 94.89 | 2.43 | ↓ |

| | | | | | | | |
|---|------|----|------|-----|-------|-------|---|
| Initial Letter Death in Service | 3 | 10 | 3 | 85 | 100 | 1 |  |
| Initial letter Death on Deferred | 11 | 10 | 11 | 85 | 100 | 1.09 |  |
| Interfund Linking In Actual | 38 | 35 | 17 | 85 | 44.74 | 92.89 |  |
| Interfund Linking In Quote | 86 | 35 | 77 | 85 | 89.54 | 26.99 |  |
| Interfund Out Actual | 41 | 35 | 39 | 85 | 95.12 | 13.46 |  |
| Interfund Out Quote | 41 | 35 | 39 | 85 | 95.12 | 11.44 |  |
| Life Certificate | 103 | 10 | 89 | 85 | 86.41 | 4.76 |  |
| Monthly Posting | 893 | 10 | 836 | 95 | 93.62 | 5.38 |  |
| NI adjustment to Pension at State Pension Age | 8 | 20 | 8 | 85 | 100 | 17.63 |  |
| Pension Estimate | 89 | 10 | 80 | 90 | 89.89 | 8.06 |  |
| Pension Saving Statement | 1 | 20 | 1 | 100 | 100 | 1 | |
| Phone Call Received | 868 | 3 | 841 | 95 | 96.89 | 1.32 |  |
| Refund Actual | 173 | 10 | 173 | 90 | 100 | 2.51 |  |
| Refund Quote | 303 | 35 | 286 | 85 | 94.39 | 10.7 |  |
| Retirement Actual | 153 | 10 | 144 | 90 | 94.12 | 4.42 |  |
| Transfer In Actual | 17 | 35 | 16 | 85 | 94.12 | 33.82 |  |
| Transfer In Quote | 33 | 35 | 32 | 85 | 96.97 | 12.03 |  |
| Transfer Out Payment | 23 | 35 | 23 | 85 | 100 | 12.57 |  |
| Transfer Out Quote | 52 | 35 | 49 | 85 | 94.23 | 15.35 |  |
| Update Member Details | 1268 | 20 | 1208 | 100 | 95.27 | 5.99 |  |