

Appendix 2 - KPI Performance

| Category                            | Subcategory   | Complete at End of Period | # Completed Within KPI Target | % Completed Within KPI Target | # Completed Within Legally Required Response Time | % Completed Within Legal Target |
|-------------------------------------|---|---------------------------|-------------------------------|-------------------------------|---|---------------------------------|
| A1: Deaths                          | B1: Initial Death Notification  | 363                       | 326                           | 89.80%                        | 349   | 96.10%                          |
| A2: Survivors Pensions              | B2: Survivors Pensions Pensioner or Deferred Pensioner (Actual)           | 136                       | 106                           | 77.90%                        | 131   | 96.30%                          |
|                                     | B3: Survivors Pensions Death in Service (Actual)                          | 8                         | 6                             | 75.00%                        | 7   | 87.50%                          |
|                                     | B4: Survivors Pensions (Estimate)   | 13                        | 12                            | 92.30%                        | 13  | 100.00%                         |
| A3: Death Grant Payment             | B5: Death Grant Payment (Pensioner, Deferred Pensioner, Death in Service) | 120                       | 110                           | 91.70%                        | 117   | 97.50%                          |
| A4: Payment of Retirement Benefits  | B6: Payment of Retirement Benefits for Active members (Actual)            | 357                       | 186                           | 52.10%                        | 352   | 98.60%                          |
|                                     | B7: Payment of Retirement Benefits for Deferred Benefit members (Actual)  | 590                       | 427                           | 72.40%                        | 580   | 98.30%                          |
| A5: Estimate of Retirement Benefits | B8: Estimate of Retirement Benefits for Active members                    | 449                       | 363                           | 80.80%                        | 438   | 97.60%                          |
|                                     | B9: Estimate of Retirement Benefits for Deferred Benefit members          | 889                       | 824                           | 92.70%                        | 870   | 97.90%                          |
| A6: Refunds                         | B10: Notification of Refund Entitlement                                   | 609                       | 274                           | 45.00%                        | 274   | 45.00%                          |
|                                     | B11: Payment of Refunds   | 297                       | 280                           | 94.30%                        | 295   | 99.30%                          |
| A7: Deferred Benefits               | B12: Provision of Deferred Benefit Statements                             | 761                       | 237                           | 31.10%                        | 237   | 31.10%                          |
| A8: LGPS Transfer In                | B13: LGPS Transfer In Estimates   | 16                        | 2                             | 12.50%                        | 6   | 37.50%                          |
|                                     | B14: LGPS Transfer In Actuals   | 34                        | 2                             | 5.90%                         | 4   | 11.80%                          |
| A9: LGPS Transfer Out               | B15: LGPS Transfer Out Estimates  | 89                        | 37                            | 41.60%                        | 74  | 83.10%                          |
|                                     | B16: LGPS Transfer Out Actuals  | 88                        | 6                             | 6.80%                         | 29  | 33.00%                          |
| A10: Aggregation                    | B17: Aggregation In Estimates   | 101                       | 22                            | 21.80%                        | 27  | 26.70%                          |
|                                     | B18: Aggregation In Actuals   | 609                       | 237                           | 38.90%                        | 237   | 38.90%                          |
|                                     | B19: Reversal of Auto Aggregation   | 15                        | 6                             | 40.00%                        | 8   | 53.30%                          |
| A11: Non LGPS Transfer In           | B20: Non LGPS Transfer In Estimate  | 43                        | 20                            | 46.50%                        | 38  | 88.40%                          |
|                                     | B21: Non LGPS Transfer In Actual  | 26                        | 18                            | 69.20%                        | 23  | 88.50%                          |
| A12: Non LGPS Transfer Out          | B22: Non LGPS Transfer Out Estimate                                       | 107                       | 54                            | 50.50%                        | 104   | 97.20%                          |
|                                     | B23: Non LGPS Transfer Out Actual   | 16                        | 4                             | 25.00%                        | 13  | 81.30%                          |
| A13: Divorces                       | B24: Pension Sharing on Divorce Estimates                                 | 134                       | 123                           | 91.80%                        | 133   | 99.30%                          |
|                                     | B25: Pension Sharing on Divorce Implementations                           | 0                         | 0                             |                               | 0   |                                 |
| A14: General Correspondence         | B26: General Correspondence with scheme members                           | 2,108                     | 1,976                         | 93.70%                        | 2,091   | 99.20%                          |
| A15: Change of Details              | B27: Change of Scheme Member Details                                      | 1,051                     | 1,047                         | 99.60%                        | 1,049   | 99.80%                          |
| A16: Lost Pension                   | B28: Lost Pension   | 170                       | 151                           | 88.80%                        | 158   | 92.90%                          |
| A17: New Joiners                    | B29: New Starters to the Scheme   | 2,587                     | 1,583                         | 61.20%                        | 1,583   | 61.20%                          |
| A18: Opt Outs                       | B30: Opt Outs under 3 months  | 148                       | 74                            | 50.00%                        | 84  | 56.80%                          |
| Total                               |   | 11,934                    | 8,513                         | 71.33%                        | 9,324   | 78.13%                          |

| Tolerance |       |          |       |      |
|-----------|-------|----------|-------|------|
| 90%+      | Green | 80 - 90% | Amber | 80%- |
|           |       |          |       | Red  |