

## APPENDIX 2 – KPI Results

### RAG Criteria (applied separately to KPI and Legal Target)

- **Green (G):** ≥ 90%
- **Amber (A):** 70%–89.9%
- **Red (R):** < 70%

### RAG Summary Table – KPI vs Legal Targets

Category	KPI %	KPI RAG	Legal %	Legal RAG
Initial Death Notification	88.80%	Amber	98.50%	Green
Survivors Pension – Pensioner/Deferred	70.60%	Amber	91.70%	Green
Survivors Pension – Death in Service	60.00%	Red	100.00%	Green
Survivors Pension (Estimate)	94.70%	Green	100.00%	Green
Death Grant Payment	84.80%	Amber	97.10%	Green
Retirement Benefits – Active (Actual)	83.60%	Amber	98.90%	Green
Retirement Benefits – Deferred (Actual)	92.00%	Green	98.70%	Green
Retirement Estimate – Active	92.70%	Green	99.60%	Green
Retirement Estimate – Deferred	91.70%	Green	97.90%	Green
Notification of Refund Entitlement	78.50%	Amber	78.50%	Amber
Payment of Refunds	93.80%	Green	100.00%	Green
Deferred Benefit Statements	87.70%	Amber	87.70%	Amber
LGPS Transfer In Estimate	42.90%	Red	57.10%	Red
LGPS Transfer In Actuals	28.60%	Red	35.70%	Red
LGPS Transfer Out Estimate	69.10%	Red	81.50%	Amber
LGPS Transfer Out Actuals	11.40%	Red	94.30%	Green
Aggregation In Estimate	42.70%	Red	47.80%	Red
Aggregation In Actuals	53.00%	Red	53.00%	Red

Category	KPI %	KPI RAG	Legal %	Legal RAG
Reversal of Auto Aggregation	20.00%	■	25.00%	■
Non-LGPS Transfer In Estimate	43.20%	■	94.60%	■
Non-LGPS Transfer In Actual	71.40%	■	100.00%	■
Non-LGPS Transfer Out Estimate	60.30%	■	96.20%	■
Non-LGPS Transfer Out Actual	38.50%	■	92.30%	■
Pension Sharing on Divorce Estimate	91.30%	■	96.20%	■
Pension Sharing on Divorce Implementation	75.00%	■	75.00%	■
General Correspondence	94.90%	■	98.90%	■
Change of Member Details	88.60%	■	93.40%	■
Lost Pension	96.00%	■	98.00%	■
New Starters	55.30%	■	55.30%	■
Opt Outs (<3 months)	50.00%	■	72.50%	■