Appendix 2 - October 2026 Recovery Update

Executive Dashboard

Overall Service Position

Measure	Position
Overall Service Performance	🟡 Improving
Cases Completed in October	**5,579**
KPIs Improving	**Majority of KPIs**
Next quarter Outlook	🟢 Positive Trajectory

Service Area RAG Status

Service Area	Status	Trend
Retirements & Refunds	🟢	Improving
Estimates & Divorce	🟢	Improving
Death & Survivor Benefits	🟢	Improving
General Administration	🟢	Stable / High Performing
Transfers & Interfunds	🔴	Early Recovery Emerging
Aggregations	🔴	Ongoing Challenge

Summary

October performance provides encouraging evidence that the recovery actions introduced in response to the challenges experienced during July to September 2026 are beginning to deliver measurable improvements. Whilst legislative change activity, including McCloud remedy implementation, SCAPE factor changes and specialist resource pressures, continues to impact some areas of the service, most KPI measures improved during October.

A total of 5,579 cases were completed during October, with particularly strong performance improvements evident within Retirement Benefits, Survivor Benefits, Member Estimates and several Transfer activities.

Overall, October performance demonstrates an improving operational position and provides confidence that recovery actions are beginning to deliver sustainable benefits as the service progresses.

Retirements & Refunds

Performance Summary

KPI	Cases Completed	October	RAG
Retirement Benefits (Active)	113	87.6%	🟡
Retirement Benefits (Deferred)	163	96.9%	🟢
Notification of Refund Entitlement	126	87.3%	🟡
Payment of Refunds	84	96.4%	🟢
Opt Outs	46	78.3%	🟡

Commentary

This service area demonstrated strong recovery during October. Retirement Benefits achieved the most significant improvement, particularly Deferred Retirements, which returned to green status. Refund activity remained stable and high performing, whilst Opt Outs continued to improve.

Estimates & Divorce

Performance Summary

KPI	Cases Completed	October	RAG
Active Member Estimates	202	92.6%	🟢
Deferred Member Estimates	279	91.8%	🟢
Deferred Benefit Statements	226	85.8%	🟡
Pension Sharing on Divorce Estimates	45	91.1%	🟢
Pension Sharing on Divorce Implementations	2	100.0%	🟢
Lost Pension & QAPAs	19	89.5%	🟡

Commentary

Estimate activity continues to demonstrate strong recovery. Both Active and Deferred Estimates exceeded 90%, whilst Divorce casework achieved high levels of performance. Deferred Benefits remain under pressure but continues to show improvement.

Death & Survivor Benefits

Performance Summary

KPI	Cases Completed	October	RAG
Initial Death Notifications	129	89.1%	🟡
Survivor Pensions (Pensioner/Deferred)	48	85.4%	🟡
Survivor Pensions (Death in Service)	3	33.3%	🔴
Survivor Pension Estimates	11	90.9%	🟢
Death Grant Payments	43	76.7%	🔴

Commentary

Death & Survivor Benefits delivered some of the strongest improvements across Operations during October. Significant gains were achieved within Survivor Pension processing and Survivor Estimates. Although several specialist activities remain below target, the overall trend is positive.

Transfers & Interfunds

Performance Summary

KPI	Cases Completed	October	RAG
LGPS Transfer In Estimates	3	100.0%	🟢
LGPS Transfer In Actuals	3	66.7%	🔴
LGPS Transfer Out Estimates	50	44.0%	🔴
LGPS Transfer Out Actuals	13	7.7%	🔴
Non-LGPS Transfer In Estimates	19	73.7%	🟡
Non-LGPS Transfer In Actuals	9	55.6%	🔴

Non-LGPS Transfer Out Estimates	41	41.5%	🔴
Non-LGPS Transfer Out Actuals	7	85.7%	🟡
New Starters	2,001	100.0%	🟢

Commentary

Transfers & Interfunds remains the most challenged operational area. October performance provides encouraging evidence of recovery within Transfer In processing, particularly LGPS Transfer In Estimates, which achieved 100% performance.

LGPS Transfer Out activity remains significantly below target and recovery activity remains a priority.

Aggregations

Performance Summary

KPI	Cases Completed	RAG
Aggregation Estimates (C & D Types)	64	🟢
Aggregation Actuals (C Type)	1	🟢
Aggregation Actuals (D Type)	18	🔴
Aggregation A & B Types	130	🟡
ERN Changes	222	🔴
Next Day Transfers	163	🟡
Concurrent Employments	43	🟢
Reversal of Auto Aggregation	13	🔴

Commentary

Aggregations remain a significant operational risk area. Whilst several individual measures performed well during October, overall performance continues to be affected by backlog volumes and specialist casework. Outstanding aggregation work remains a key management focus.

General Administration

Performance Summary

KPI	Cases Completed	October	RAG
General Correspondence	831	94.3%	🟢
Change of Scheme Member Details	407	95.6%	🟢

Commentary

General Administration remains a strong performing operational area, maintaining consistently high service levels across all major activities.