

Annex 1

		Cases Last Quarter				
		Measured Against SLA				
		Total Processed	Total Processed in Target	Percentage Processed within Target	Total Processed within 5 days of Target	Percentage Processed within 5 days of Target
Retirement (from Active)	Quote - 5 days	249	192	77.11%	36	91.57%
	Payment - 5 days	206	165	80.10%	26	92.72%
Retirement (from Deferred)	Quote - 30 days	104	58	55.77%	1	56.73%
	Payment - 5 days	225	179	79.56%	22	89.33%
Deaths	Notification - 5 days	95	85	89.47%	8	97.89%
	Payment - 5 days	59	33	55.93%	14	79.66%
Refund of contributions	Quote - 10 days	519	231	44.51%	18	47.98%
	Payment - 10 days	328	292	89.02%	11	92.38%
Deferreds (early leavers)	20 days	607	539	88.80%	44	96.05%
Transfers In	Quote - 10 days	51	32	62.75%	8	78.43%
	Payment - 10 days	105	36	34.29%	21	54.29%
Transfers Out	Quote - 10 days	249	77	30.92%	21	39.36%
	Payment - 10 days	16	7	43.75%	5	75.00%
Estimates	10 days	188	141	75.00%	17	84.04%
		3001	2067	68.88%	252	77.27%

RAG key	
Red	Less than 75%
Amber	75 - 89%
Green	90 - 100%

		Tasks Last Quarter							
		Average Days to Process	Actual Days to Process						
			0 - 5	6 - 10	11 - 15	16 - 20	21 - 25	26 - 30	31+
Retirement (from Active)	Quote - 5 days	5	192	36	8	2	4	3	4
	Payment - 5 days	4	165	26	9	3	0	2	1
Retirement (from Deferred)	Quote - 30 days	28	59	5	6	5	12	1	16
	Payment - 5 days	-10	179	22	9	7	5	1	2
Deaths	Notification - 5 days	3	85	8	1	1	0	0	0
	Payment - 5 days	6	33	14	9	0	1	1	1
Refund of contributions	Quote - 10 days	21	188	43	18	14	7	48	201
	Payment - 10 days	6	259	33	11	12	3	5	5
Deferreds (early leavers)	20 days	12	179	163	108	89	44	8	16
Transfers In	Quote - 10 days	13	22	10	8	3	2	0	6
	Payment - 10 days	22	27	9	21	6	3	6	33
Transfers Out	Quote - 10 days	24	46	31	21	29	20	14	88
	Payment - 10 days	16	5	2	5	0	1	2	1
Estimates	10 days	8	107	34	17	17	7	2	4

RAG key	Processed
Red	More than 5 days over target
Amber	Within 5 days of target
Green	Within target

SLA Standards for Processing Admin Tasks						
Work Type	Target Processing SLA	Q3 Jul 17 - Sept 17	Q4 Oct 17 - Dec 17	Q1 Jan 18 - Mar 18	Q2 Apr 18 - Jun 18	Trend
Retirement (from Active)	Quote - 5 days	30.10%	61.54%	91.42%	77.11%	
	Payment - 5 days	44.22%	63.28%	90.21%	80.10%	
Retirement (from Deferred)	Quote - 30 days	34.00%	50.00%	47.92%	55.77%	
	Payment - 5 days	53.29%	68.22%	91.26%	79.56%	
Deaths	Notification - 5 days	90.48%	94.25%	96.81%	89.47%	
	Payment - 5 days	32.89%	42.25%	82.22%	55.93%	
Refund of contributions	Quote - 10 days	67.48%	81.32%	14.77%	44.51%	
	Payment - 10 days	96.79%	83.18%	96.56%	89.02%	
Deferreds (early leavers)	Notification - 20 days	95.56%	32.32%	55.67%	88.80%	
Transfers In	Quote - 10 days	24.44%	56.00%	66.67%	62.75%	
	Payment - 10 days	33.33%	33.33%	34.29%	34.29%	
Transfers Out	Quote - 10 days	33.10%	27.54%	24.24%	30.92%	
	Payment - 10 days	38.46%	45.00%	56.52%	43.75%	
Estimates	Quote - 10 days	65.52%	64.50%	44.24%	75.00%	
Total Cases Processed						
		1956	2447	3435	3001	

RAG key	
Red	Less than 75%
Amber	75 - 89%
Green	90 - 100%

Annex 3

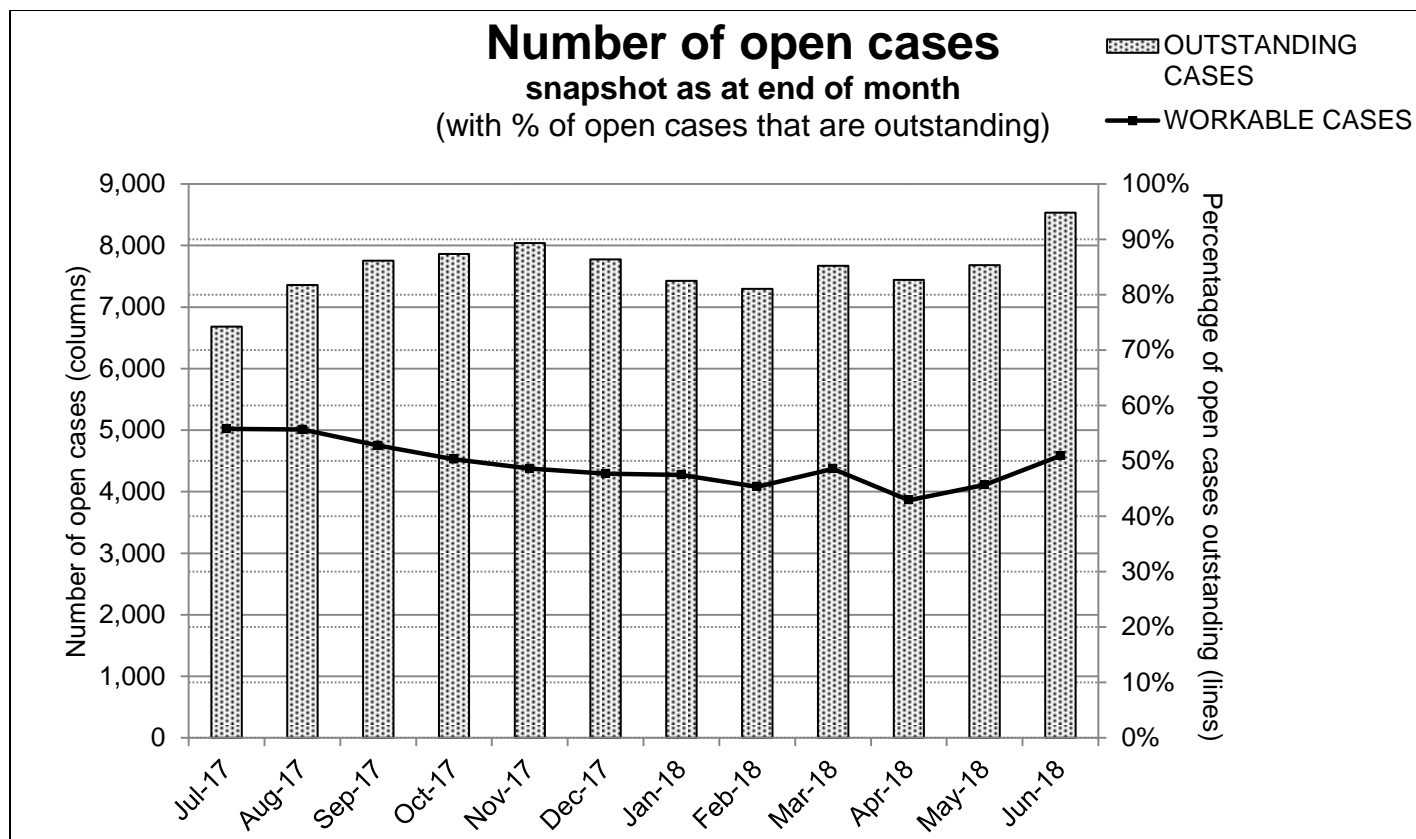
Statutory requirements	Timescale/deadline	3 months to 30/06/18	Notes
Year End data from employer	by 30 June	Yes	All YE data submitted in preparation for ABS run
Issue ABS	by 31 August	0	Deferred ABS issued w/c 18 June Active ABS issued w/c 13 August
Notify scheme changes	within 3 months (deadline 14 August)	Yes	Notification of Amendment Regs to all members via website 19 June 2018. Pensioners - newsletter in April Deferred members - newsletter in June. Active members - newsletter with ABS w/c 13 August.
Issue Active member newsletter	2 issues per year	1	Issued May 2018 (2 nd issue August 2018)
Issue Deferred member newsletter	1 issue per year	1	Issued June 2018
Issue Pensioner member newsletter	1 issue per year	1	Issued April 2018

Annex 4

Other performance standards	3 months to 30/06/18	2017/18 target	Notes
Retirements survey - satisfaction %	77%	65%	
% of employers signed up to submit data electronically (ESS/iConnect)	64.6%	70%	
% of active membership covered by ESS/iConnect	96.6%	90%	
% of all members with electronic access (MSS)	19.8%	No target set	

% of active members with electronic access (MSS)	24.8%	No target set	
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Annex 5



Annex 6

