

## Appendix 2b

### APF Completed Cases - Performance against Statutory Legal Deadline

|                            |                             | Cases Last Quarter                           |                 |                           |                                    |
|----------------------------|-----------------------------|--|-----------------|---------------------------|------------------------------------|
|                            |                             | Measured Against Statutory Legal Requirement |                 |                           |                                    |
|                            |                             | Target                                       | Total Processed | Total Processed in Target | Percentage Processed within Target |
| Retirement (from Active)   | Notification of Benefits    | 46 days                                      | 144             | 117                       | 81.25%                             |
| Retirement (from Deferred) | Notification of Benefits    | 23/46 days                                   | 178             | 163                       | 91.57%                             |
| Deaths                     | Notification of Benefits    | 46 days                                      | 66              | 63                        | 95.45%                             |
| Refund of contributions    | Notification of Entitlement | 46 days                                      | 284             | 284                       | 100.00%                            |
| Deferreds (early leavers)  | Notification of Entitlement | 46 days                                      | 207             | 207                       | 100.00%                            |
| Transfers In               | Provision of Quotation      | 46 days                                      | 37              | 28                        | 75.68%                             |
| Transfers Out              | Notification of Trf Value   | 69 days                                      | 192             | 176                       | 91.67%                             |
|                            | Payment of Trf Value        | 138 days                                     | 20              | 18                        | 90.00%                             |
| Estimates                  | Provision of Quotation      | 46 days                                      | 202             | 149                       | 73.76%                             |

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

#### Comments where performance has fallen below expected target:-

Retirement (from Active) – 90% of the cases where retirement from active notifications have not been processed in target is due to the late submission of a leaver notification from the Employer.

Estimates – Other than managing with limited resource to cover all areas of work, APF received a higher volume of estimate requests than usual this quarter, possibly due to the annual benefit statements being sent out to members prompting them to look at their pension.

Transfers In – The majority of these cases were late due to high volumes of work at Senior Pensions Officer level meaning that these cases were taking longer than expected to be checked. A couple were due to APF waiting for an employer to consent to a transfer in once it had received the request as the member had joined more than 12 months prior to the request.