

Appendix A KPI table for the period 1st April 2024 to 30 September 2024

KPI Category	Complete at End of Period	Customer Target	Completed Within Customer Target	% Complete Within Customer Target	Legally required Target	# Completed Within Legally Required Response Time	% Complete Within Legal Target
Aggregation - Send notification of aggregation options	579	40 days	537	92.7%	2 months	555	95.9%
Deaths – Initial letter acknowledgement death	264	10 days	163	61.7%	2 months	260	98.5%
Deaths – Letter notifying amount of dependant's benefit	161	15 days	132	82.0%	2 months	147	91.3%
Deferment – calculate and notify deferred benefits	778	30 days	463	59.5%	2 months	614	78.9%
Deferred into pay – process and pay lump sum retirement grant	406	15 days	249	61.3%	2 months	397	97.8%
Divorce quote – Letter detailing cash equivalent value and other benefits	44	15 days	33	75.0%	2 months	40	90.9%
Refund – Process and pay a refund	194	10 days	180	92.8%	2 months	193	99.5%
Retirements – Letter notifying actual retirement benefits active	309	15 days	279	90.3%	2 months	308	99.7%
Retirements – letter notifying actual retirement benefits deferred	521	15 days	241	46.3%	2 months	493	94.6%
Retirements – Letter notifying estimate of retirement benefits active	160	15 days	152	95.0%	2 months	159	99.4%
Retirements – letter notifying estimate of retirement benefits deferred	80	15 days	75	93.8%	2 months	79	98.8%
Retirements – process and pay lump sum retirement grant active	256	15 days	248	96.9%	2 months	256	100.0%
Transfers in – Letter detailing transfer	164	15 days	53	32.3%	2 months	115	70.1%
Transfers in – Letter detailing transfer in quote	225	15 days	168	74.7%	2 months	210	93.3%
Transfers out – letter detailing transfer	152	15 days	79	52.0%	2 months	106	69.7%
Transfers out – Letter detailing transfer out quote	76	15 days	18	23.7%	2 months	48	63.2%
Grand Total	4,446		3,082	69.3%		4,054	91.2%

Customer Target - set by the Fund and documented in the Administration Strategy

Legal Target - Disclosure Regulations

Percentage Complete Within Legal Target Appendix A

