

Appendix A KPI's April 2024 to March 2025

Category	Q1 Complete at End of Period Apr 24 to Jun24	Q2 Complete at End of Period Jul24 to Sep24	Q3 Complete at End of Period Oct24 to Dec24	Q4 Complete at End of Period Jan25 to Mar25	Legal target	Q1 Complete Within Legal Target Apr24 to Jun24	Q2 Complete Within Legal Target Jul24 to Sep24	Q3 Complete Within Legal Target Oct24 to Dec24	Q4 Complete Within Legal Target Jan25 to Mar25
Aggregation - Send notification of aggregation options	328	251	302	347	2 months	97.0%	94.4%	90.1%	96.8%
Deaths – Initial letter acknowledgement death	152	112	127	131	2 months	99.3%	97.3%	97.6%	96.9%
Deaths – Letter notifying amount of dependant's benefit	75	86	93	86	2 months	92.0%	90.7%	95.7%	96.5%
Deferment – calculate and notify deferred benefits	518	260	222	228	2 months	77.2%	82.3%	70.7%	57.5%
Deferred into pay – process and pay lump sum retirement grant	225	181	198	212	2 months	97.8%	97.8%	96.0%	95.8%
Divorce quote – Letter detailing cash equivalent value and other benefits	27	17	23	29	2 months	85.2%	100.0%	100.0%	100.0%
Refund – Process and pay a refund	112	82	76	88	2 months	99.1%	100.0%	98.7%	100.0%
Retirements – Letter notifying actual retirement benefits active	109	200	116	116	2 months	100.0%	99.5%	100.0%	99.1%
Retirements – letter notifying actual retirement benefits deferred	255	266	196	286	2 months	93.7%	95.5%	96.9%	97.6%
Retirements – Letter notifying estimate of retirement benefits active	84	76	69	65	2 months	98.8%	100.0%	100.0%	98.5%
Retirements – letter notifying estimate of retirement benefits deferred	43	37	35	52	2 months	97.7%	100.0%	100.0%	98.1%
Retirements – process and pay lump sum retirement grant active	134	122	158	129	2 months	100.0%	100.0%	100.0%	100.0%
Transfers in – Letter detailing transfer	75	89	85	90	2 months	74.7%	66.3%	70.6%	71.1%
Transfers in – Letter detailing transfer in quote	93	132	110	95	2 months	92.5%	93.9%	94.5%	94.7%
Transfers out – letter detailing transfer	85	67	76	69	2 months	75.3%	62.7%	71.1%	85.5%
Transfers out – Letter detailing transfer out quote	34	42	38	37	2 months	70.6%	57.1%	63.2%	67.6%
Grand Total	2349	2020	1924	2060					







