
Appendix 1: Performance Indicators

Performance to 30 September 2022

| Category | Performance Indicator | Cases in Quarter | Performance in Quarter | Total Cases in 2022-2023 | Performance in 2022-2023 | Performance in 2021-2022 |
|---------------------------------|---|------------------|------------------------|--------------------------|--------------------------|--------------------------|
| Retirements – Disclosure | Within two months of retirement provide a statement containing retirement benefit information. | 253 | 82.61% | 471 | 84.42% | 86.65% |
| Retirements – in Fund's control | Within 10 days of receiving all required information provide a statement containing retirement benefit information. | 253 | 98.02% | 471 | 98.32% | 98.99% |
| Deferments - Disclosure | Within one month of being notified of a leaver, provide that member information as | 487 | 96.88% | 843 | 98.02% | 86.70% |

| | | | | | | |
|----------------------------|--|-------|--------|-------|--------|--------|
| | to the rights and options available. | | | | | |
| Transfers Out – Disclosure | Within one month of a request, provide that member information as to the transfer rights and options available. | 32 | 96.88% | 71 | 98.44% | - |
| Transfers Out – Quotation | Within three months of a request, provide a quotation of the cash equivalent transfer value to which a member is entitled. | 32 | 100% | 71 | 100% | - |
| Estimates | Within two months of a request, provide a statement of estimated pension entitlement online or in writing. | 3,386 | 100% | 2,785 | 100% | - |
| Telephone Helpline | Calls from Scheme Members answered first time | 1,549 | 98.90% | 3,107 | 99.15% | 98.47% |

| Category | Performance Indicator | Total Registrations to date | Total Online Calculations Completed by Scheme Members | Total Changes Transacted Online by Scheme Members | Secure messages sent by Scheme Members Online |
|---------------|--|-----------------------------|---|---|---|
| Online Portal | Total Registrations, and Activity through Pensions Online portal (https://pensionsonline.durham.gov.uk/) | 17,933 | 26,254 | 13,097 | 2,383 |