
Appendix 1: Performance Indicators

Performance to 31 March 2023

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.	178	80.9%	874	82.61%	86.65%
Retirements – in Fund's control	Within 10 days of receiving all required information provide a statement containing retirement benefit information.	178	100%	874	98.47%	98.99%
Deferments - Disclosure	Within one month of being notified of a leaver, provide that member information as	306	96.73%	1,492	95.91%	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.	34	100%	128	99.22%	-
Transfers Out – Quotation	Within three months of a request, provide a quotation of the cash equivalent transfer value to which a member is entitled.	34	100%	128	99.22%	-
Estimates	Within two months of a request, provide a statement of estimated pension entitlement online or in writing.	1,138	100%	10,089	100%	-
Telephone Helpline	Calls from Scheme Members answered first time	3527	99.5%	16,180	99.4%	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/)	19,626	34,236	15,545	2,899