

---

## Appendix 1: Performance Indicators

---

Performance to 30 June 2023

Category	Performance Indicator	Cases in Quarter	Performance in Quarter	Total Cases in 2023-24	Performance in 2023-24	Performance in 2022-2023	Performance in 2021-2022
Retirements – Disclosure	Within two months of retirement provide a statement containing retirement benefit information.	224	83.04%	224	83.04%	82.61%	86.65%
Retirements – in Fund's control	Within 10 days of receiving all required information provide a statement containing retirement benefit information.	224	96.88%	224	96.88%	98.47%	98.99%

Deferments - Disclosure	Within one month of being notified of a leaver, provide that member information as to the rights and options available.	316	94.62%	316	94.62%	95.91%	86.70%
Transfers Out – Disclosure	Within one month of a request, provide that member information as to the transfer rights and options available.	31	100%	31	100%	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.	31	100%	31	100%	99.22%	-
Estimates	Within two months of a request, provide a statement of estimated	3,249	100%	3,249	100%	100%	-

	pension entitlement online or in writing.						
Telephone Helpline	Calls from Scheme Members answered first time	3,736	99.50%	3,736	99.50%	99.4%	98.47%

<b>Category</b>	<b>Performance Indicator</b>	<b>Total Registrations to date</b>	<b>Total Online Calculations Completed by Scheme Members</b>	<b>Total Changes Transacted Online by Scheme Members</b>	<b>Secure messages sent by Scheme Members Online</b>
Online Portal	Total Registrations, and Activity through Pensions Online portal ( <a href="https://pensionsonline.durham.gov.uk/">https://pensionsonline.durham.gov.uk/</a> )	20,466	38,821	17,644	3,161