
Appendix 1: Performance Indicators

Performance to 30 September 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.	271	81.55%	495	81.86%	82.61%	86.65%
Retirements – in Fund's control	Within 10 days of receiving all required information provide a statement containing retirement benefit information.	271	99.26%	495	98.77%	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.	505	94.26%	821	94.31%	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.	26	100%	57	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.	26	100%	57	100%	99.22%	-
Estimates	Within two months of a request, provide a statement of estimated	4,222	100%	7,471	100%	100%	-

	pension entitlement online or in writing.						
Telephone Helpline	Calls from Scheme Members answered first time	3,686	99.50%	7,422	99.50%	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/)	20,466	38,821	17,644	3,161