

Appendix 1: Performance Indicators

Performance to 31 December 2023

Category	Performance Indicator	Cases in Quarter	Performance in Quarter	Total Cases 2023-24	Performance in 2023-24 to date	Performance in 2022-2023	Performance in 2021-2022
Retirements – Disclosure	Within two months of retirement provide a statement containing retirement benefit information.	175	87.43%	558	83.31%	82.61%	86.65%
Retirements – in Fund’s control	Within 10 days of receiving all required information provide a statement containing retirement benefit information.	175	98.86%	662	98.79%	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.	303	97.69%	1,070	95.22%	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.	18	100%	75	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.	18	100%	75	100%	99.22%	-

Estimates	Within two months of a request, provide a statement of estimated pension entitlement online or in writing.	2,330	100%	9,801	100%	100%	-
Telephone Helpline	Calls from Scheme Members answered first time	2,870	99.30%	10,235	99.44%	99.40%	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/)	21,732	47,297	19,676	3,751