

Appendix 11 – Amendments to the Administration Strategy

Function/Task	Existing Performance Target	New Performance Target
Provide active and deferred scheme members with value data if no annual benefit statement has been issued in last 13 months and no estimate provided in the last 12 months	N/A	10 working days
Provide value data to new scheme members –	N/A	No later than the first annual benefit statement or 12 months from the end of the first full year of scheme membership, whichever is soonest
Acknowledge the death of a scheme member	10 working days	5 working days
Process transfer in quotations	10 working days	20 working days
Transfer notification of credited membership / accrued pension account to be notified to the Scheme Member	10 working days	15 working days
Process transfers out quotations	10 working days	15 working days
Process transfers out payments	10 working days	15 working days
Process a divorce quotation	10 working days	20 working days
Provide retirement options to scheme members	10 working days	20 working days
Provide a member estimate of benefits	10 working days	20 working days