

Subcategory	Complete at End of Period	# Completed Within Customer Target	% Complete Within Customer Target	# Completed Within KPI Target	% Complete Within KPI Target	# Completed Within Legally Required Response Time	% Complete Within Legal Target
Grand Total	5,356	4,030	75.2%	4,013	74.9%	5,113	95.5%
B1: Communication issued with acknowledgement of death of active, deferred, pensioner and dependent member	153	147	96.1%	93	60.8%	153	100.0%
B2: Communication issued confirming benefits payable	142	124	87.3%	124	87.3%	141	99.3%
B2: Communication issued confirming benefits payable (frozen refund)	2	2	100.0%	2	100.0%	2	100.0%
B2: Communication issued confirming payment of death grant	32	32	100.0%	32	100.0%	32	100.0%
B3: Communication issued to deferred member with confirmation of pension and lump sum options (actual)	264	256	97.0%	256	97.0%	263	99.6%
B3: Communication issued to deferred member with pension and lump sum options (quotation)	159	155	97.5%	155	97.5%	158	99.4%
B4: Communication issued to active member with confirmation of pension and lump sum options (actual)	119	97	81.5%	97	81.5%	115	96.6%
B4: Communication issued to active member with pension and lump sum options (quotation)	12	11	91.7%	11	91.7%	12	100.0%
B4: Communication issued to confirm recalculated benefits (actual)	15	5	33.3%	5	33.3%	15	100.0%
B5: Communication issued with deferred benefit options	426	152	35.7%	133	31.2%	247	58.0%
B5: Communication issued with frozen refund options	292	90	30.8%	70	24.0%	235	80.5%
B5: Communication issued with recalculated deferred benefit options	12	2	16.7%	3	25.0%	12	100.0%
B5: Communication issued with recalculated frozen refund options	18	7	38.9%	9	50.0%	18	100.0%
B6: Communication issued to scheme member providing quotation of interfund in	150	87	58.0%	109	72.7%	150	100.0%
B6: Communication issued to scheme member with completion of interfund in	93	76	81.7%	82	88.2%	93	100.0%
B7: Communication issued to scheme member with completion of interfund out	3	3	100.0%	3	100.0%	3	100.0%
B7: Communication issued to scheme memberproviding quotation of interfund out	51	41	80.4%	45	88.2%	51	100.0%
B8: Payment of refund	221	209	94.6%	216	97.7%	221	100.0%
B9: Divorce quotation	42	36	85.7%	42	100.0%	42	100.0%
B10: Communication issued following actual divorce proceedings i.e application of a Pension Sharing Order	0	0		0		0	
B11: Member estimates requested by scheme member and employer	146	109	74.7%	127	87.0%	146	100.0%
B12: Communication issued to new starters	1,088	1,088	100.0%	1,088	100.0%	1,088	100.0%
B13: Communication issued to member who has rejoined the scheme (Actual)	218	57	26.1%	39	17.9%	218	100.0%
B13: Communication issued to member who has rejoined the scheme (Quote)	46	12	26.1%	4	8.7%	46	100.0%
B14: Transfers in (including club transfers) Actual	22	21	95.5%	22	100.0%	22	100.0%
B14: Transfers in (including club transfers) Quotation	25	8	32.0%	20	80.0%	25	100.0%
B15: Transfers out (including club transfers) Actual	1	0	0.0%	0	0.0%	1	100.0%
B15: Transfers out (including club transfers) Quotation	124	65	52.4%	87	70.2%	124	100.0%
B16: Communication issued to members to confirm set up of additional contributions	21	19	90.5%	20	95.2%	21	100.0%
B17: Trivial commutation paperwork issued to member (payment)	4	3	75.0%	3	75.0%	4	100.0%
B17: Trivial commutation paperwork issued to member (quotation)	36	25	69.4%	25	69.4%	36	100.0%
B18: Communication issued with concurrent merge options	172	38	22.1%	38	22.1%	172	100.0%
B19: Communication with member and provider for additional voluntary contributions	3	3	100.0%	3	100.0%	3	100.0%
B20: Pension enquiry received from customer (member, 3rd party)	695	514	74.0%	514	74.0%	695	100.0%
B21: Updating member's personal details	236	229	97.0%	229	97.0%	236	100.0%
B22: Communication sent to members chasing decision on frozen refund	158	158	100.0%	158	100.0%	158	100.0%
B22: Initial request issued to previous LG fund for interfund information	155	149	96.1%	149	96.1%	155	100.0%