

No	Description	Target	Lead Officer	Actual (Score and RAG)	Reporting Period	Previous Score	Date Last Reported	Improvement/Deterioration
1	FUNDING							
	IMPROVE FUNDING LEVEL Funding level to increase from current levels of 72%	100%	PT	76.6%	30/09/14	79.8%	30/06/14	↓ -3.20%
2	PENSION ADMINISTRATION							
	DEATH BENEFITS Notify potential beneficiary of lump sum death grant within 5 days	95%	JB	100.0%	3 months to 30 Sep 14	100.0%	3 months to 30 June 14	→ 0.00%
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%		90.4%	3 months to 30 Sep 14	91.5%	3 months to 30 June 14	↓ -1.10%
	Pay death grant within 5 days of receipt of relevant documentation	90%		100.0%	3 months to 30 Sep 14	90.0%	3 months to 30 June 14	↑ 10.00%
	Issue notification of dependant's pension within 5 days of receipt of relevant claim forms	90%		100.0%	3 months to 30 Sep 14	90.0%	3 months to 30 June 14	↑ 10.00%
	RETIREMENTS Retirement options to members within 10 days	90%	JB	82.4%	3 months to 30 Sep 14	83.7%	3 months to 30 June 14	↓ -1.30%
	New retirement benefits processed for payment following receipt of election within 10 days	95%		98.1%	3 months to 30 Sep 14	95.7%	3 months to 30 June 14	↑ 2.40%
	BENEFIT STATEMENTS ABS issued to 95% of eligible active members by 30th September	95%	JB	Not achieved	3 months to 30 Sep 14	100.0%	3 months to 30 June 13	
	DBS issued to 85% of eligible deferred members by 30th June	95%		100% issued by 30/06/14	3 months to 30 Sep 14	100% issued by 26/09/13	3 months to 30 June 13	
	NEW JOINERS New starters processed within 20 days	90%	JB	98.8%	3 months to 30 Sep 14	98.8%	3 months to 30 June 14	↓ -0.03%
	TRANSFERS IN Non LGPS transfers-in quotations processed within 20 days	90%	JB	97.2%	3 months to 30 Sep 14	100.0%	3 months to 30 June 14	↓ -2.80%
	Non LGPS transfers-in payments processed within 20 days	90%		100.0%	3 months to 30 Sep 14	100.0%	3 months to 30 June 14	→ 0.00%
	TRANSFERS OUT Non LGPS transfers-out quotations processed within 20 days	90%	JB	97.0%	3 months to 30 Sep 14	100.0%	3 months to 30 June 14	↓ -3.00%
	Non LGPS transfers out payments processed within 20 days	90%		100.0%	3 months to 30 Sep 14	100.0%	3 months to 30 June 14	→ 0.00%
	MATERIAL POSTED ON WEBSITE Relevant Communications Material will be posted onto website within one week of being signed off	95%	JB	● 100%	3 months to 30 Sep 14	● 100%	3 months to 30 June 14	
3	CUSTOMER SERVICE							
	EMPLOYER SATISFACTION/SURVEY Overall satisfaction score for employers to be 80%	80%	PT/JB	Not available	At Sep 14	● 92%	At May 14	
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%	80%	JB	● 85%	3 months to 30 Sep 14	● 95%	3 months to 31 Mar 14	
4	INVESTMENT PERFORMANCE							
	INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark	Benchmark	PT	BENCHMARK 8.2%	12 months to 30 Sep 14	BENCHMARK 11.3%	12 months to 30 June 14	
				ACTUAL 9.4%	12 months to 30 Sep 14	ACTUAL 10.6%	12 months to 30 June 14	
5	DATA							
	DATA QUALITY Data quality within the Fund should be at least 90% accurate.	90%	JB	● 99%	12 months to 31 Mar 14	● 99%	12 months to 31 Mar 14	
6	CONTRIBUTIONS							
	CONTRIBUTIONS RECEIVED Pension Fund 98% (total value) of contributions to be received by 21st day of the ensuing period.	98%	PT	98%	Sep-14	98%	Jun-14	→ 0.00%
7	AUDIT							
	CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	Clean Report	PT/JB	Achieved	12 months to 31 Mar 14	Achieved	12 months to 31 Mar 13	
	Annual audit returns no significant findings	No significant findings		Achieved		Achieved		
8	COST							
	COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile	< lowest quartile	PT/JB	Achieved	12 months to 31 Mar 14	Achieved	12 months to 31 Mar 13	

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