

No	Description	Target	Lead Officer	No of cases	Actual (Score and RAG)	Reporting Period	Previous no of cases	Previous Score	Date Last Reported	Improvement/Deterioration	Comments
1	FUNDING										
	IMPROVE FUNDING LEVEL Funding level to increase from current levels of 72%	100%	PT		75.5%	31/12/15		70.9%	30/09/15	↑ 4.60%	
2	PENSION ADMINISTRATION										
	DEATH BENEFITS Notify potential beneficiary of lump sum death in service grant within 5 days	95%		5	100.0%	3 months to 31 Dec 15	4	100.0%	3 months to 30 Sep 15	→ 0.00%	
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%	JB	87	77.0%	3 months to 31 Dec 15	108	75.0%	3 months to 30 Sep 15	↑ 2.00%	
	Pay death grant within 5 days of receipt of relevant documentation	90%		29	89.7%	3 months to 31 Dec 15	35	77.0%	3 months to 30 Sep 15	↑ 12.66%	
	Issue notification of dependant's pension within 5 days of receipt of relevant claim forms	90%		29	89.7%	3 months to 31 Dec 15	35	77.0%	3 months to 30 Sep 15	↑ 12.70%	
	RETIREMENTS Employer decision and options to members within 10 days	90%	JB	167	53.1%	3 months to 31 Dec 15	246	63.0%	3 months to 30 Sep 15	↓ -9.89%	2 Long term sickness absences in Benefits team during period impacted ability to meet targets
	New retirement benefits processed for payment following receipt of election within 10 days	95%		205	89.8%	3 months to 31 Dec 15	293	93.9%	3 months to 30 Sep 15	↓ -4.10%	Team now restructured to focus on improved service delivery
	ILL HEALTH RETIREMENTS Retirement options to members within 10 days	90%	JB	14	100.0%	3 months to 31 Dec 15					New reporting
	New retirement benefits processed for payment following receipt of election within 10 days	95%		13	100.0%	3 months to 31 Dec 15					New reporting
	BENEFIT STATEMENTS ABS issued to 95% of eligible active members by 30th September	95%	JB		Final Tranche Issued Dec 2015/Jan 2016	12 months to 31 Aug 15	7024	1st tranche issued Oct 2015	12 months to 31 Aug 15		
	DBS issued to 85% of eligible deferred members by 30th June	95%			Issued July 2015	12 months to 30 Jun 15		Issued July 2015	12 months to 30 Jun 15		
	NEW JOINERS New starters processed within 20 days	90%	JB	877	86.9%	3 months to 31 Dec 15	691	93.2%	3 months to 30 Sep 15	↓ -6.31%	Temporary staff assisting with processing new joiners
	TRANSFERS IN Non LGPS transfers-in quotations processed within 20 days	90%	JB	100	90.0%	3 months to 31 Dec 15	77	91.0%	3 months to 30 Sep 15	↓ -1.00%	
	Non LGPS transfers-in payments processed within 20 days	90%		59	97.0%	3 months to 31 Dec 15	31	97.0%	3 months to 30 Sep 15	→ 0.00%	
	TRANSFERS OUT Non LGPS transfers-out quotations processed within 20 days	90%	JB	132	93.2%	3 months to 31 Dec 15	126	91.0%	3 months to 30 Sep 15	↑ 2.20%	
	Non LGPS transfers out payments processed within 20 days	90%		75	93.3%	3 months to 31 Dec 15	37	92.0%	3 months to 30 Sep 15	↑ 1.33%	
	INTERNAL DISPUTE CASES Number of cases referred to the stage 1 IDRP adjudicator	N/A	JB/NM	1	N/A	3 months to 31 Dec 15					New reporting
	MATERIAL POSTED ON WEBSITE Relevant Communications Material will be posted onto website within one week of being signed off	95%	JB/NM		100%	3 months to 31 Dec 15		100%	3 months to 30 Sep 15		
3	CUSTOMER SERVICE										
	EMPLOYER SATISFACTION/SURVEY Overall satisfaction score for employers to be 80%	80%	JB/NM		Annual Survey	At Aug 15		82%	At Aug 15		19/23 respondents rated service good or higher. 4 rated Fair April to June 2015 retirements
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%	80%	JB		92%	At Jun 15		89%	At Jun 15	↑ 2.67%	
4	INVESTMENT PERFORMANCE										
	INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark	Benchmark	PT		BENCHMARK 3.0%	12 months to 30 Sept 15		BENCHMARK 2.0%	12 months to 30 Sept 15		
					ACTUAL 3.8%	12 months to 30 Sept 15		ACTUAL 2.7%	12 months to 30 Sept 15		
5	DATA										
	DATA QUALITY Common data quality within the Fund should be at least 90% accurate.	90%	JB		Due 31 March 2016	12 months to 31 Mar 15		99%	12 months to 31 Mar 15		
6	CONTRIBUTIONS										
	CONTRIBUTIONS RECEIVED Pension Fund 98% (total value) of contributions to be received by 21st day of the ensuing period.	98%	PT		98%	Dec-15		98%	Sep-15	→ 0.00%	
7	AUDIT										
	CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	Unqualified	PT/ JB / NM			12 months to 31 Mar 15		Achieved	12 months to 31 Mar 15		
	Annual audit returns no significant findings	No significant findings						Administration Internal Audit opinion "effective"			
8	COST										
	COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile	< lowest quartile	PT/ JB / NM		Lowest Quartile achieved	12 months to 31 Mar 15		Lowest Quartile achieved	12 months to 31 Mar 15		
9	SCHEME MEMBERSHIP										
	SURREY COUNTY COUNCIL Number of SCC members administered by the Pension Service Team	N/A	JB		89,154	As of 31 Dec 15		92,389	As of 30 Sep 15		
	Active members				33,101						
	Deferred members				32,966						
	Pensioner members				23,087						New reporting
	TOTAL Total number of members across all LGPS schemes administered by the Pension Service Team	N/A	JB		204,000	As of 31 Dec 15		No material change	As of 30 Sep 15		This sum includes all current schemes administered by the Pension Services Team.
10	SCHEME EMPLOYERS										
	SURREY EMPLOYERS Number of active employers in the Surrey Pension Fund	N/A	NM		201	As of 31 Dec 15		194	As of 30 Sep 15		

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