1	<u>Description</u>	<u>Target</u>	<u>Lead</u> Officer	No of cases	Actual (Score and RAG)	Reporting Period	Previous no of cases	Previous Score	<u>Date Last</u> Reported	Improvement/D eterioration	Comments
<u>1</u>	FUNDING IMPROVE FUNDING LEVEL		<u>Gilleel</u>				<u>01 da3e3</u>		neported	<u>eterioration</u>	
	Funding level to increase from current levels of	100%	PT		72.7%	31/03/16		75.5%	31/12/15	-2.80%	
<u>2</u>	72% PENSION ADMINISTRATION										
	<b>DEATH BENEFITS</b> Notify potential beneficiary of lump sum death in	95%		6	100.0%	3 months to 31	5	100.0%	3 months to 31	<b>→</b> 0.00%	
	service grant within 5 days					Mar 16			Dec 15	,	
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%	JB	97	75.0%	3 months to 31 Mar 16	87	77.0%	3 months to 31 Dec 15	-2.00%	
	Pay death grant within 5 days of receipt of relevant documentation	90%		48	90.0%	3 months to 31 Mar 16	29	89.7%	3 months to 31 Dec 15	<b>1</b> 0.34%	
	Issue notification of dependant's pension within 5	000/		40	00.00/	3 months to 31	20		3 months to 31	0.200/	
	days of receipt of relevant claim forms  RETIREMENTS	90%		48	90.0%	Mar 16	29	89.7%	Dec 15	0.30%	
	Employer decision and options to members within	90%		196	56.1%	3 months to 31 Mar 16	167	53.1%	3 months to 31 Dec 15	<b>1</b> 2.99%	
	10 days  New retirement benefits processed for payment	050/	JB	201	00.00/	3 months to 31	205	00.00/	3 months to 31	0.700/	
	following receipt of election within 10 days  ILL HEALTH RETIREMENTS	95%		201	89.0%	Mar 16	205	89.8%	Dec 15	-0.76%	
	Retirement options to members within 10 days	90%		17	100.0%	3 months to 31 Mar 16	14	100.0%	3 months to 31 Dec 15	→ 0.00%	
	New retirement benefits processed for payment		JB			3 months to 31			3 months to 31		
	following receipt of election within 10 days	95%		17	100.0%	Mar 16	13	100.0%	Dec 15	0.00%	
	BENEFIT STATEMENTS  ABS issued to 95% of eligible active members by	95%			Final Tranche Issued Dec	12 months to 31	7024	Final Tranche Issued Dec	12 months to 31		
	30th September		JB		2015/Jan 2016	Aug 15		2015/Jan 2016	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	607	96.0%	3 months to 31	877	86.9%	3 months to 31	<b>1</b> 9.15%	
	TRANSFERS IN			307		Mar 16			Dec 15		
	Non LGPS transfers-in quotations processed within 20 days	90%	JB	43	90.0%	3 months to 31 Mar 16	100	90.0%	3 months to 31 Dec 15	→ 0.00%	
	Non LGPS transfers-in payments processed within 20 days	90%		34	87.0%	3 months to 31 Mar 16	59	97.0%	3 months to 31 Dec 15	<b>↓</b> -10.00%	
	TRANSFERS OUT	000/		7.4	72.00/	3 months to 31	122	02.20/	3 months to 31	24 200/	
	Non LGPS transfers-out quotations processed within 20 days	90%	JB	74	72.0%	Mar 16	132	93.2%	Dec 15	-21.20%	Target days are 20 but the statutory time limit is 90
	Non LGPS transfers out payments processed within 20 days	90%		58	73.0%	3 months to 31 Mar 16	75	93.3%	3 months to 31 Dec 15	-20.33%	days (period of guarantee)
	INTERNAL DISPUTE CASES	21/2	10/11/4	1		3 months to 31	4	21/2	3 months to 31		
	Number of cases referred to the stage 1 IDRP adjudicator	N/A	JB/NM	1		Mar 16	1	N/A	Dec 15	0	
	MATERIAL POSTED ON WEBSITE Relevant Communications Material will be posted	95%	JB/NM		100%	3 months to 31		100%	3 months to 31	0.00%	
	onto website within one week of being signed off	33%	JE/MIVI		100%	Mar 16		100%	Dec 15	0.00%	
<u>3</u>	CUSTOMER SERVICE										Annual survey:
				1					1		
	EMPLOYER SATISFACTION/SURVEY	900/	ID /NIN 4		939/	A+ Aug 15		920/	A+ Aug 15		19/23 respondents
	EMPLOYER SATISFACTION/SURVEY  Overall satisfaction score for employers to be 80%	80%	JB/NM		82%	At Aug 15		82%	At Aug 15		19/23 respondents rated service good or higher. 4 rated Fair
	Overall satisfaction score for employers to be 80%	80%	JB/NM		82%	At Aug 15		82%	At Aug 15		19/23 respondents rated service good or
		80%	JB/NM JB		82%	At Aug 15 At Jun 15		82% 89%	At Aug 15 At Jun 15	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair
<u>4</u>	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY				84%	At Jun 15		89%	At Jun 15	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair
<u>4</u>	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND	80%	JB							-5.00%	19/23 respondents rated service good or higher. 4 rated Fair
<u>4</u>	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY  Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE				84%  BENCHMARK -0.9%  ACTUAL	At Jun 15  12 months to 31  Mar 16  12 months to 31		89%  BENCHMARK 3.0%  ACTUAL	At Jun 15  12 months to 31  Dec 15  12 months to 31	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair
<u>4</u>	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark	80%	JB		84% BENCHMARK -0.9%	At Jun 15  12 months to 31  Mar 16		89% BENCHMARK 3.0%	At Jun 15  12 months to 31  Dec 15	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair
<u>4</u>	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA  DATA  DATA QUALITY	80%  Benchmark	JB PT		84%  BENCHMARK -0.9%  ACTUAL -1.2%	At Jun 15  12 months to 31  Mar 16  12 months to 31		89%  BENCHMARK 3.0%  ACTUAL 3.8%	At Jun 15  12 months to 31  Dec 15  12 months to 31	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair
	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate.	80%	JB		84%  BENCHMARK -0.9%  ACTUAL	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16		89%  BENCHMARK 3.0%  ACTUAL	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)
<u>4</u>	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA  DATA  DATA QUALITY Common data quality within the Fund should be	80%  Benchmark	JB PT		84%  BENCHMARK -0.9%  ACTUAL -1.2%	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31		89%  BENCHMARK 3.0%  ACTUAL 3.8%	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31	-5.00%	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
	Overall satisfaction score for employers to be 80%  MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS	80%  Benchmark	JB PT		84%  BENCHMARK -0.9%  ACTUAL -1.2%	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31		89%  BENCHMARK 3.0%  ACTUAL 3.8%	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31	→ -5.00% → 1.00%	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate.  CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions	80%  Benchmark  90%	JB PT JB		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT	80%  Benchmark  90%  100%	JB PT JB		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT	80%  Benchmark  90%	JB PT PT		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16		89%  BENCHMARK 3.0%  ACTUAL 3.8%	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	80%  Benchmark  90%  100%  Unqualified  No	JB PT JB		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments + Administration	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate.  CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the	80%  Benchmark  90%  100%  Unqualified	JB PT  PT/JB /		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments +	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  Achieved  Administration Internal Audit opinion	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	80%  Benchmark  90%  100%  Unqualified  No significant	JB PT  PT/JB /		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments + Administration Internal Audit	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  Achieved  Administration Internal Audit	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80% INVESTMENT PERFORMANCE INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST PER MEMBER	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest	JB PT  PT/JB / NM  PT/JB /		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile	At Jun 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15  12 months to 31 Mar 15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u> <u>7</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80% INVESTMENT PERFORMANCE INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile	80%  Benchmark  90%  100%  Unqualified  No significant findings	JB PT PT/JB / NM		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15		19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u> <u>7</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA  DATA QUALITY Common data quality within the Fund should be at least 90% accurate.  CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest	JB PT  PT/JB / NM  PT/JB /		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved	At Jun 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15  12 months to 31 Mar 15	1.00%	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u> <u>7</u> <u>8</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL Number of SCC members administered by the Pension Service Team	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest quartile	JB PT  PT/JB / NM  PT/JB / NM		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,847	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,154	At Jun 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15  12 months to 31 Mar 15	1.00%	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u> <u>7</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA  DATA QUALITY Common data quality within the Fund should be at least 90% accurate.  CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL Number of SCC members administered by the	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest	JB PT  PT/JB / NM  PT/JB /		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved	At Jun 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15  12 months to 31 Mar 15	1.00%	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u> <u>7</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL Number of SCC members administered by the Pension Service Team Active members	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest quartile	JB PT  PT/JB / NM  PT/JB / NM		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,847  33,404	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,154  33,101	At Jun 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15  12 months to 31 Mar 15	<ul> <li>1.00%</li> <li>♠ 693</li> <li>♠ 303</li> </ul>	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation
<u>6</u> <u>7</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80% INVESTMENT PERFORMANCE INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL Number of SCC members administered by the Pension Service Team Active members Deferred members Deferred members Pensioner members Pensioner members TOTAL Total number of members across all LGPS	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest quartile	JB PT  PT/JB / NM  PT/JB / NM		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,847  33,404 33,200	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  12 months to 31 Mar 15		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,154  33,101 32,966	At Jun 15  12 months to 31 Dec 15  12 months to 31 Mar 15  Dec-15  12 months to 31 Mar 15  12 months to 31 Mar 15	1.00%  1.00%  693  303  234	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation Submission
<u>6</u> <u>7</u> <u>9</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate.  CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL Number of SCC members administered by the Pension Service Team Active members Deferred members Pensioner members Pensioner members TOTAL Total number of members across all LGPS schemes administered by the Pension Service Team	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest quartile  N/A	JB PT JB PT/JB / NM PT/JB / NM		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,847  33,404 33,200 23,243	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  As of 31 Mar 16		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,154  33,101 32,966 23,087	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15  12 months to 31 Mar 15  12 months to 31 Mar 15  As of 31 Dec 15	1.00%  1.00%  693  303  234	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation Submission  This sum includes all current schemes adminstered by the
<u>6</u> <u>7</u> <u>9</u>	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%  INVESTMENT PERFORMANCE  INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark  DATA DATA QUALITY Common data quality within the Fund should be at least 90% accurate. CONTRIBUTIONS CONTRIBUTIONS CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.  AUDIT CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors  Annual audit returns no significant findings  COST COST PER MEMBER Administration cost per member to remain in lowest CIPFA benchmarking quartile SCHEME MEMBERSHIP SURREY COUNTY COUNCIL Number of SCC members administered by the Pension Service Team Active members Deferred members Pensioner members Pensioner members TOTAL Total number of members across all LGPS schemes administered by the Pension Service	80%  Benchmark  90%  100%  Unqualified  No significant findings  < lowest quartile  N/A	JB PT JB PT/JB / NM PT/JB / NM		84%  BENCHMARK -0.9%  ACTUAL -1.2%  99%  99%  Achieved  Investments + Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,847  33,404 33,200 23,243	At Jun 15  12 months to 31 Mar 16  12 months to 31 Mar 15  Mar-16  12 months to 31 Mar 15  As of 31 Mar 16		89%  BENCHMARK 3.0%  ACTUAL 3.8%  99%  98%  Achieved  Administration Internal Audit opinion "effective"  Lowest Quartile achieved  89,154  33,101 32,966 23,087	At Jun 15  12 months to 31 Dec 15  12 months to 31 Dec 15  12 months to 31 Mar 15  12 months to 31 Mar 15  12 months to 31 Mar 15  As of 31 Dec 15	1.00%  1.00%  693  303  234  156	19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)  Due Q2 for Valuation Submission  This sum includes all current schemes adminstered by the

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