

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		72.7%	31/03/16		75.5%	31/12/15	↓ -2.80%	
2	PENSION ADMINISTRATION										
	DEATH BENEFITS Notify potential beneficiary of lump sum death in service grant within 5 days	95%	JB	6	100.0%	3 months to 31 Mar 16	5	100.0%	3 months to 31 Dec 15	→ 0.00%	
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%		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	↑ 0.34%	
	Issue notification of dependant's pension within 5 days of receipt of relevant claim forms	90%		48	90.0%	3 months to 31 Mar 16	29	89.7%	3 months to 31 Dec 15	↑ 0.30%	
	RETIREMENTS Employer decision and options to members within 10 days	90%	JB	196	56.1%	3 months to 31 Mar 16	167	53.1%	3 months to 31 Dec 15	↑ 2.99%	
	New retirement benefits processed for payment following receipt of election within 10 days	95%		201	89.0%	3 months to 31 Mar 16	205	89.8%	3 months to 31 Dec 15	↓ -0.76%	
	ILL HEALTH RETIREMENTS Retirement options to members within 10 days	90%	JB	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 following receipt of election within 10 days	95%		17	100.0%	3 months to 31 Mar 16	13	100.0%	3 months to 31 Dec 15	→ 0.00%	
	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	Final Tranche Issued Dec 2015/Jan 2016	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	607	96.0%	3 months to 31 Mar 16	877	86.9%	3 months to 31 Dec 15	↑ 9.15%	
	TRANSFERS IN 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	↓ -10.00%	
	TRANSFERS OUT Non LGPS transfers-out quotations processed within 20 days	90%	JB	74	72.0%	3 months to 31 Mar 16	132	93.2%	3 months to 31 Dec 15	↓ -21.20%	Target days are 20 but the statutory time limit is 90 days (period of guarantee)
	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%	
	INTERNAL DISPUTE CASES Number of cases referred to the stage 1 IDRPA adjudicator	N/A	JB/NM	1		3 months to 31 Mar 16	1	N/A	3 months to 31 Dec 15	→ 0	
	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 Mar 16		100%	3 months to 31 Dec 15	→ 0.00%	
3	CUSTOMER SERVICE										
	EMPLOYER SATISFACTION/SURVEY Overall satisfaction score for employers to be 80%	80%	JB/NM		82%	At Aug 15		82%	At Aug 15		Annual survey: 19/23 respondents rated service good or higher. 4 rated Fair (none rated poor)
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%	80%	JB		84%	At Jun 15		89%	At Jun 15	↓ -5.00%	
4	INVESTMENT PERFORMANCE										
	INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark	Benchmark	PT		BENCHMARK -0.9%	12 months to 31 Mar 16		BENCHMARK 3.0%	12 months to 31 Dec 15		
					ACTUAL -1.2%	12 months to 31 Mar 16		ACTUAL 3.8%	12 months to 31 Dec 15		
5	DATA										
	DATA QUALITY Common data quality within the Fund should be at least 90% accurate.	90%	JB		99%	12 months to 31 Mar 15		99%	12 months to 31 Mar 15		Due Q2 for Valuation Submission
6	CONTRIBUTIONS										
	CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.	100%	PT		99%	Mar-16		98%	Dec-15	↑ 1.00%	
7	AUDIT										
	CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	Unqualified	PT/JB / NM		Achieved	12 months to 31 Mar 15		Achieved	12 months to 31 Mar 15		
	Annual audit returns no significant findings	No significant findings			Investments + Administration Internal Audit opinion "effective"			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		89,847	As of 31 Mar 16		89,154	As of 31 Dec 15	↑ 693	
	Active members				33,404			33,101		↑ 303	
	Deferred members				33,200			32,966		↑ 234	
	Pensioner members				23,243			23,087		↑ 156	
	TOTAL Total number of members across all LGPS schemes administered by the Pension Service Team	N/A	JB		204,000	As of 31 Mar 16		204,000	As of 31 Dec 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		202	As of 31 Mar 16		201	As of 31 Dec 15	↑ 1	

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