

No	Description	Target	Lead Officer	Actual (Score and RAG)	Reporting Period	Previous Score	Date Last Reported	Improvement/Deterioration
<b>1</b>	<b>FUNDING</b>							
	<b>IMPROVE FUNDING LEVEL</b> Funding level to increase from current levels of 72%	100%	PT	72%	31/03/10	79.00%	31/12/07	↓ -7.00%
<b>2</b>	<b>PPENSION ADMINISTRATION</b>							
	<b>DEATH BENEFITS</b> Notify potential beneficiary of lump sum death grant within 5 days	95%	PB	100.00%	3 months to 31 Mar 13	100.00%	3 months to 31 Dec 12	→ 0.00%
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%		94.00%	3 months to 31 Mar 13	93.00%	3 months to 31 Dec 12	→ 1.00%
	Pay death grant within 5 days of receipt of relevant documentation	90%		92.00%	3 months to 31 Mar 13	95.00%	3 months to 31 Dec 12	↓ -3.00%
	Issue notification of dependant's pension within 5 days of receipt of relevant claim forms	90%		92.00%	3 months to 31 Mar 13	95.00%	3 months to 31 Dec 12	↓ -3.00%
	<b>RETIREMENTS</b> Retirement options to members within 10 days	90%	PB	90.00%	3 months to 31 Mar 13	91.00%	3 months to 31 Dec 12	↓ -1.00%
	New retirement benefits processed for payment following receipt of election within 10 days	95%		98.00%	3 months to 31 Mar 13	98.00%	3 months to 31 Dec 12	→ 0.00%
	<b>BENEFIT STATEMENTS</b> ABS issued to 95% of eligible active members by 30th September	95%	PB	100.00%	3 months to 31 Mar 13	100.00%	3 months to 31 Dec 12	→ 0.00%
	DBS issued to 85% of eligible deferred members by 30th June	95%		100.00%	3 months to 31 Mar 13	100.00%	3 months to 31 Dec 12	→ 0.00%
	<b>NEW JOINERS</b> New starters processed within 20 days	85%	PB	99.00%	3 months to 31 Mar 13	99.00%	3 months to 31 Dec 12	→ 0.00%
	<b>TRANSFERS IN</b> Non LGPS transfers-in quotations processed within 20 days	85%	PB	100.00%	3 months to 31 Mar 13	100.00%	3 months to 31 Mar 12	→ 0.00%
	Non LGPS transfers-in payments processed within 20 days	85%		100.00%	3 months to 31 Mar 13	100.00%	3 months to 31 Mar 12	→ 0.00%
	<b>TRANSFERS OUT</b> Non LGPS transfers-out quotations processed within 20 days	85%	PB	100.00%	3 months to 31 Mar 13	97.00%	3 months to 31 Mar 12	↑ 3.00%
	Non LGPS transfers out payments processed within 20 days	85%		100.00%	3 months to 31 Mar 13	97.00%	3 months to 31 Mar 12	↑ 3.00%
	<b>MATERIAL POSTED ON WEBSITE</b> All relevant Communications Material will be posted onto website within one week of being signed off	95%	PB	● 100%	3 months to 31 Mar 13	n/a	3 months to 31 Mar 12	
<b>3</b>	<b>CUSTOMER SERVICE</b>							
	<b>EMPLOYER SATISFACTION/SURVEY</b> Overall satisfaction score for employers to be 80%	80%	PT/PB	Data pending	12 months to 31 Mar 14	Data pending	12 months to 31 Mar 12	
	<b>MEMBER SATISFACTION/SURVEY</b> Overall satisfaction score for members to be 80%	80%	PB	Data pending	12 months to 31 Mar 14	Data pending	12 months to 31 Mar 12	
<b>4</b>	<b>INVESTMENT PERFORMANCE</b>							
	<b>INVESTMENT RETURNS/OVERALL FUND PERFORMANCE</b> Returns to at least match the benchmark	Benchmark	PT	BENCHMARK 11.6%	12 months to 31 Mar 13	BENCHMARK 3.3%	12 months to 31 Dec 12	↑ 3.10%
				ACTUAL 14.7%	12 months to 31 Mar 13	ACTUAL 1.9%	12 months to 31 Dec 12	
<b>5</b>	<b>DATA</b>							
	<b>DATA QUALITY</b> Data quality within the Fund should be at least 90% accurate.	90%	PB	Data pending	12 months to 31 Mar 13	Data pending	12 months to 31 Mar 12	
<b>6</b>	<b>CONTRIBUTIONS</b>							
	<b>CONTRIBUTIONS RECEIVED</b> Pension Fund 98% (total value) of contributions to be received by 21st day of the ensuing period.	95%	PT	98.00%	Feb-13	97.00%	Jan-13	↑ 1.00%
<b>7</b>	<b>AUDIT</b>							
	<b>CLEAN AUDIT REPORT</b> Receive an unqualified audit opinion from the external auditors	Clean Report	PT/PB	Pending	12 months to 31 Mar 13	Achieved	12 months to 31 Mar 12	
	Annual audit returns no significant findings	0 significant findings		0		0		
<b>8</b>	<b>COST</b>							
	<b>COST PER MEMBER</b> Administration cost per member to remain in lowest CIPFA benchmarking quartile	< lowest quartile	PT/PB	Data pending	12 months to 31 Mar 13	Achieved	12 months to 31 Mar 12	

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