

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	72%	31/03/10	79.00%	31/12/07	↓ -7.00%
2	PENSION ADMINISTRATION							
	DEATH BENEFITS Notify potential beneficiary of lump sum death grant within 5 days	95%	PB	100.00%	3 months to 30 Jun 13	100.00%	3 months to 31 Mar 13	→ 0.00%
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%		96.08%	3 months to 30 Jun 13	94.00%	3 months to 31 Mar 13	↑ 2.08%
	Pay death grant within 5 days of receipt of relevant documentation	90%		100.00%	3 months to 30 Jun 13	92.00%	3 months to 31 Mar 13	↑ 8.00%
	Issue notification of dependant's pension within 5 days of receipt of relevant claim forms	90%		100.00%	3 months to 30 Jun 13	92.00%	3 months to 31 Mar 13	↑ 8.00%
	RETIREMENTS Retirement options to members within 10 days	90%	PB	94.19%	3 months to 30 Jun 13	90.00%	3 months to 31 Mar 13	↑ 4.19%
	New retirement benefits processed for payment following receipt of election within 10 days	95%		99.63%	3 months to 30 Jun 13	98.00%	3 months to 31 Mar 13	↑ 1.63%
	BENEFIT STATEMENTS ABS issued to 95% of eligible active members by 30th September	95%	PB	Pending	3 months to 30 Jun 13	100.00%	3 months to 31 Mar 13	
	DBS issued to 85% of eligible deferred members by 30th June	95%		To be issued by 30 Sep 13	3 months to 30 Jun 13	100.00%	3 months to 31 Mar 13	
	NEW JOINERS New starters processed within 20 days	85%	PB	99.00%	3 months to 30 Jun 13	99.00%	3 months to 31 Mar 13	→ 0.00%
	TRANSFERS IN Non LGPS transfers-in quotations processed within 20 days	85%	PB	100.00%	3 months to 30 Jun 13	100.00%	3 months to 31 Mar 13	→ 0.00%
	Non LGPS transfers-in payments processed within 20 days	85%		100.00%	3 months to 30 Jun 13	100.00%	3 months to 31 Mar 13	→ 0.00%
	TRANSFERS OUT Non LGPS transfers-out quotations processed within 20 days	85%	PB	94.29%	3 months to 30 Jun 13	100.00%	3 months to 31 Mar 13	↓ -5.71%
	Non LGPS transfers out payments processed within 20 days	85%		94.29%	3 months to 30 Jun 13	97.00%	3 months to 31 Mar 13	↓ -2.71%
	MATERIAL POSTED ON WEBSITE All relevant Communications Material will be posted onto website within one week of being signed off	95%	PB	● 100%	3 months to 30 Jun 13	● 100%	3 months to 31 Mar 13	
3	CUSTOMER SERVICE							
	EMPLOYER SATISFACTION/SURVEY 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 13	
	MEMBER SATISFACTION/SURVEY 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 13	
4	INVESTMENT PERFORMANCE							
	INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark	Benchmark	PT	BENCHMARK 12.7%	12 months to 30 Jun 13	BENCHMARK 11.6%	12 months to 31 Mar 13	↑ 3.10%
				ACTUAL 16.8%	12 months to 30 Jun 13	ACTUAL 14.7%	12 months to 31 March 13	
5	DATA							
	DATA QUALITY 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	
6	CONTRIBUTIONS							
	CONTRIBUTIONS RECEIVED Pension Fund 98% (total value) of contributions to be received by 21st day of the ensuing period.	95%	PT	99%	Jul-13	98%	Feb-13	↑ 1.00%
7	AUDIT							
	CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	Clean Report	PT/PB	Achieved	12 months to 31 Mar 13	Achieved	12 months to 31 Mar 12	
	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/PB	Achieved	12 months to 31 Mar 13	Achieved	12 months to 31 Mar 12	

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