

Annexe 1

Since the previous Local Pension Board meeting, various updates and amendments have been made to improve the dashboard.

We now have a live version, hosted on the Tableau platform. This allows us to have a data feed that updates the dashboard with the latest information available on a scheduled interval, currently setup to pull data through daily to capture updates as they become available.

We have a few changes to the dashboard in progress currently, including the addition of the dates when the most recent data available was updated per section, and the historic background data tables will take shape as more iterations of data are added to the dashboard. We are also looking to add historic data in the short term to provide further points of comparison. Please find the dates as they pertain to the various sections of the dashboard stated below:

- Service Delivery: Updated 13/10/23.
- Internal Audit: Updated 18/9/23.
- Admission Agreements: Updated 1/9/23.
- Contributions: Updated 1/9/23
- Legacy Reduction: Updated 13/10/23.
- Investments & Stewardship: Updated 18/9/23.
- People: Updated 30/5/23
- Strategy: Updated 30/5/23

Various refinements have been made to the data to improve the usability of the information presented, including:

- People & Strategy measures have been streamlined.
- Internal Audit section has been amended to align with the current annual internal audit plan, showing all planned audits along with ratings received.
- Fund Performance metrics are now available for 3 Month, 1 year rolling, and 3 year rolling periods.

The explanations behind each metric can be found by hovering over the metric in question for a brief description and clicking the question mark symbol in the corner of each section to link to a more detailed description.

The dashboard is a source of the most up to date information available. This may differ from the data contained within quarterly reports due to the point in time in which the data is produced.

We understand that access to the dashboard has been arranged by the team, however, if any issues are experienced, please advise.

See below for a link to the live dashboard:

<https://tableau.surreycc.gov.uk/#/views/SurreyPensionTeamDashboardv23/SurreyPensionTeamDashboard?:iid=1>

A screenshot of the dashboard and the new features can be seen on the following pages.

Surrey Pension Team Dashboard



Service Delivery

% Within SLA

Grants & Surv...	69.3%	▼
Retirements ...	83.0%	▼
Transfers Paid	80.4%	▲

Target Adherence

	-20.7%	Below Benchmark
	-2.0%	Below Benchmark
	0.4%	Above Benchmark

Data Score

Common Data Score	96.0%	Pass	▲
Scheme Specific	98.0%	Pass	▲

Pass Rate Adherence

1st Point Fix

82.0%

Fund Performance

Fund Value

£5.40bn

Funding Level

138%

	3 Month	Rolling 1 Year Fund Performance	Rolling 3 Year Fund Performance
Fund Performance	1.6%	7.0%	6.8%
Performance Relative to Benchmark	-0.7%	0.0%	0.0%
Strategic Target Return			5.0%

People

Retention	100.0%	▲	10.0%
Health & Wellbeing	80.3%	▲	10.3%
Diversity	80.1%	▲	10.1%
Engagement	71.8%	▲	1.8%

Accounting and Governance

Internal Audit Ratings

Substantial	1
Reasonable	0
Partial	0
Minimal	0
No Opinion	1

External Audit

5 Not yet started

Unqualified

Admission Agreements

Brought Forward	27
Completed	4
New Agreements	8
Pending	31

Reduction Achieved

Contributions

In	£51.70m
Out	£37.70m

Legacy Reduction

Accounting & Governance

14.0%

Service Delivery

18.0%

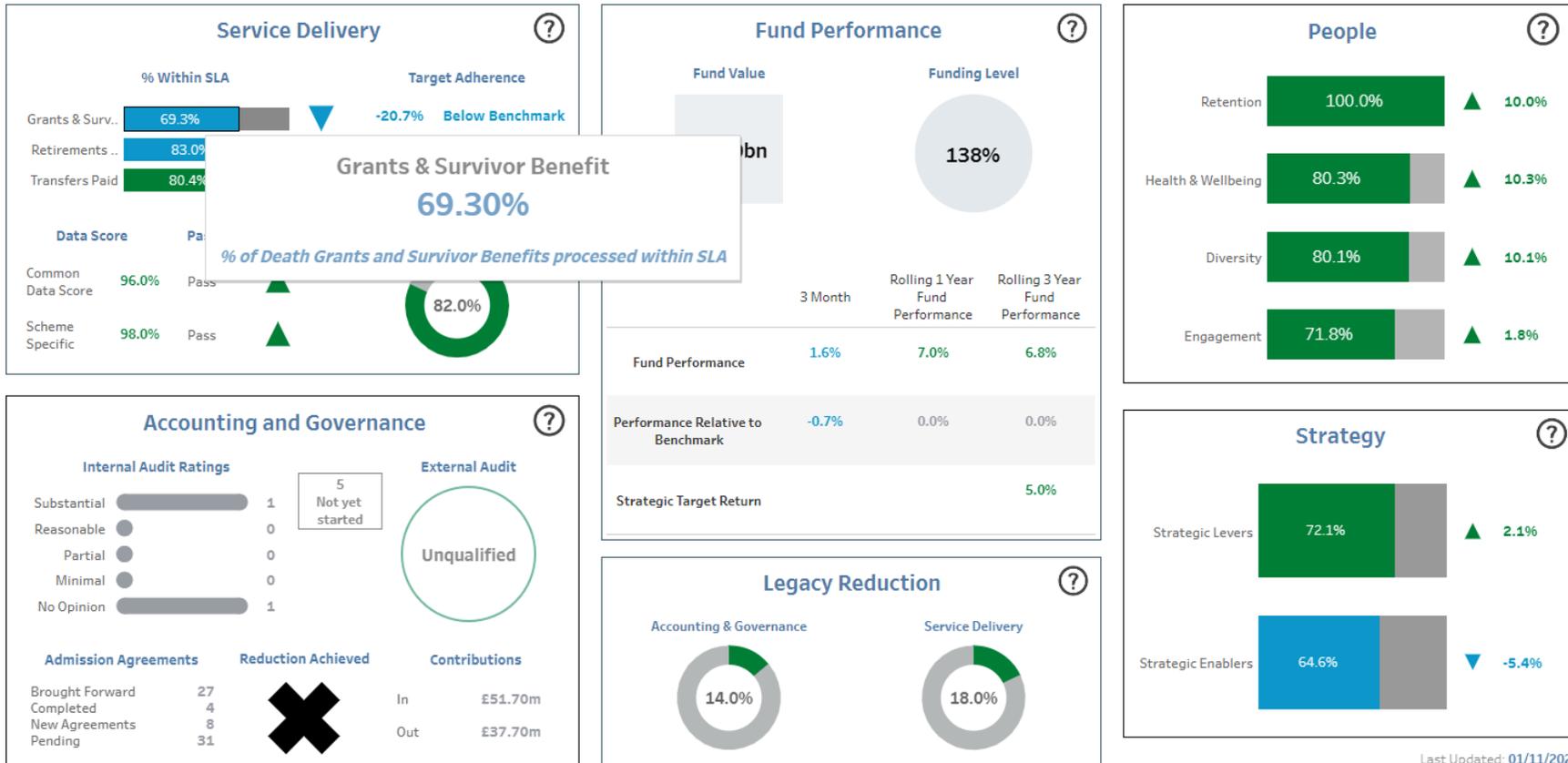
Strategy

Strategic Levers	72.1%	▲	2.1%
Strategic Enablers	64.6%	▼	-5.4%

Last Updated: 01/11/2023

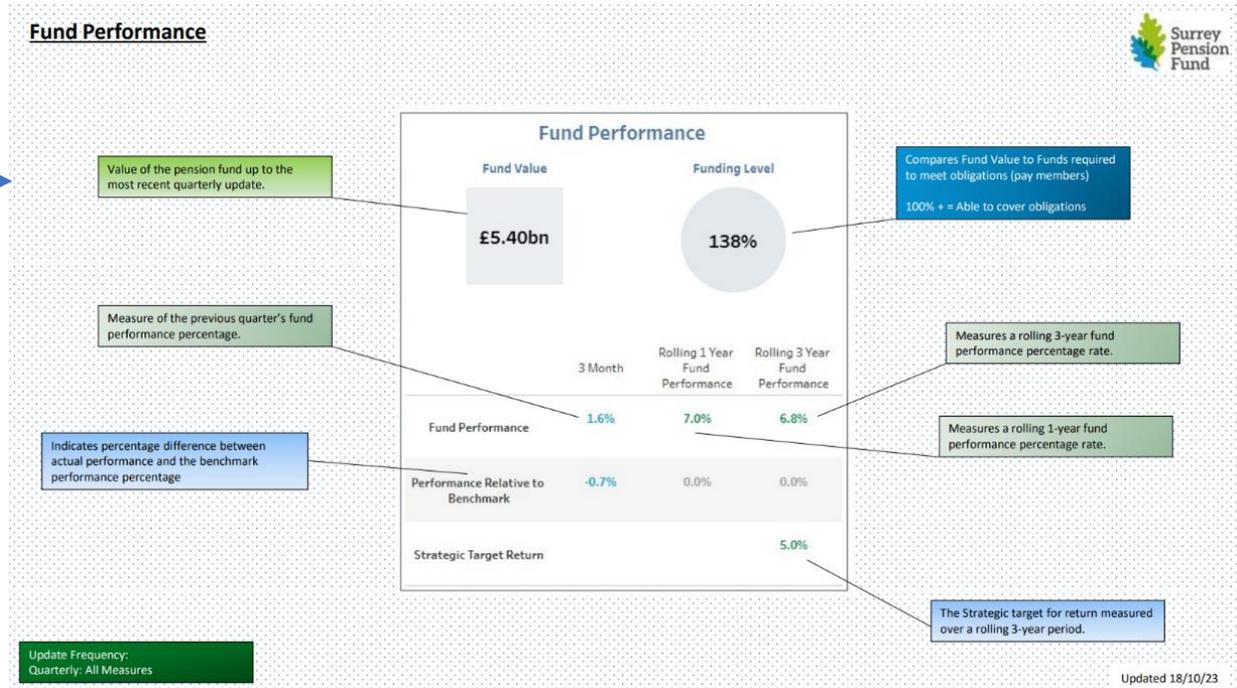
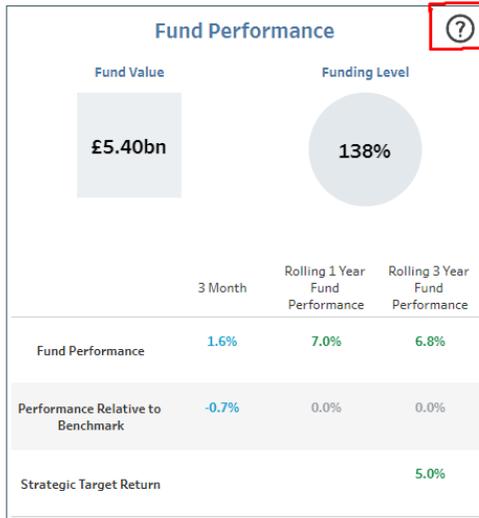
You can now hover your cursor over each metric to reveal a brief description, as demonstrated below:

Surrey Pension Team Dashboard



Last Updated: 01/11/2023

Additionally, by clicking the Question Mark icon in the top corner of each section, a detailed explanation page will open:



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