

Freq	Description	Target	Lead Officer	2019 (Score and RAG)		2018 (Score and RAG)		Improvement/Deterioration
REFUNDS								
M	Notify member of Refund within 10 days	90%	AR	<div></div> 77.8%	<div></div> 89.6%	<div></div>	-11.8%	
	Refund payments processed within 5 days	90%		<div></div> 97.8%	<div></div> 99.3%	<div></div>	-1.5%	
ACTIVE RETIREMENTS								
M	Retirement options to members within 15 days	90%	AR	<div></div> 63.7%	<div></div> 55.0%	<div></div>	8.8%	
	Notification of the actual retirement benefits will be issued to the scheme member within 5 days following receipt of the required information.	90%		<div></div> 99.1%	<div></div> 99.3%	<div></div>	-0.2%	
	New retirement benefits processed for payment following receipt of election within 5 days	90%		<div></div> 91.7%	<div></div> 97.8%	<div></div>	-6.1%	
DEFERRED RETIREMENTS								
M	Retirement options to members within 30 days	90%	AR	<div></div> 55.6%	<div></div> 90.5%	<div></div>	-34.9%	
	Notification of the actual retirement benefits will be issued to the scheme member within 5 days following receipt of the required information.	90%		<div></div> 97.0%	<div></div> 96.4%	<div></div>	0.6%	
	New retirement benefits processed for payment following receipt of election within 5 days	90%		<div></div> 94.4%	<div></div> 94.6%	<div></div>	-0.2%	
TRANSFERS IN								
M	Transfer in quotations processed within 10 days of receiving all the required information	90%	AR	<div></div> 97.0%	<div></div> 82.6%	<div></div>	14.4%	
	Transfer notification of transferred in membership to be notified to the scheme member within 10 days of receiving payment	90%		<div></div> 96.5%	<div></div> 93.1%	<div></div>	3.4%	
TRANSFERS OUT								
M	Transfer out quotations processed within 20 days	90%	AR	<div></div> 94.6%	<div></div> 89.2%	<div></div>	5.4%	
	Transfer out payments processed within 10 days	90%		<div></div> 90.0%	<div></div> 85.9%	<div></div>	4.1%	
DEATHS								
M	Acknowledgement of a death within 5 days of receiving the notification.	90%	AR	<div></div> 97.1%	<div></div> 96.1%	<div></div>	1.0%	
	Notification of benefits payable to dependents will be issued within 5 days of receiving the required information	90%		<div></div> 93.2%	<div></div> 91.6%	<div></div>	1.6%	
	Payment of death lump sum will be made within 10 days of receipt of all the required information.	90%		<div></div> 100.0%	<div></div> 99.8%	<div></div>	0.2%	
EMPLOYER AND MEMBER SERVICE - CALLS								
M	85% of calls received to the customer helpline to be answered.	85%	ST	<div></div> 81.7%	<div></div> 88.6%	<div></div>	-6.9%	
M	85% of calls received to the employer helpline to be answered.	85%	ST	<div></div> 93.3%	<div></div> 94.6%	<div></div>	-1.3%	
CUSTOMER SATISFACTION/SURVEY								
M	Overall <u>member</u> satisfaction score for members to be 90%.	90%	ST	<div></div> 100.0%	<div></div> 100.0%	<div></div>	0.0%	
M	Overall <u>employer</u> satisfaction score for employers to be 90%.	90%	ST	<div></div> 99.0%	<div></div> 100.0%	<div></div>	-1.0%	
6 M	Satisfaction rate from feedback of trustee training/pension board events to be 90%.	90%	RH	<div></div> 100.0%	<div></div> 100.0%	<div></div>	0.0%	
Q	Web Portal Registrations	Target 65000	ST	<div></div> 78570				
INVESTMENT RETURNS/OVERALL FUND PERFORMANCE								
M	Main Fund - Returns to be 0.5% above the benchmark (3 Yr. Rolling)	+/- 0.5%	JD	BENCHMARK 9.50%	BENCHMARK 13.10%	<div></div>	0.20%	
				ACTUAL 9.20%	ACTUAL 12.60%			
M	ITA Fund - Returns to match the benchmark (3 Yr. Rolling)	+ 0	JD	BENCHMARK 7.90%	BENCHMARK 10.00%	<div></div>	-0.50%	
				ACTUAL 7.50%	ACTUAL 10.10%			
BENEFIT STATEMENTS								
A	ABS produced for 100% of active member records	100%	RH	<div></div> 85.0%	<div></div> 79.0%	<div></div>	6.0%	
	DBS produced for 100% of deferred member records	100%		<div></div> 99.7%	<div></div> 98.6%	<div></div>	1.1%	
CONTRIBUTIONS RECEIVED								
M	Main Fund - Employers to pay contributions	100%	JD	<div></div> 98.2%	<div></div> 98.4%	<div></div>	-0.2%	
	ITA Fund - Employers to pay contributions	100%		<div></div> 100.0%	<div></div> 94.2%	<div></div>	5.8%	

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EXTERNAL ACCREDITATION						
6 M	The Fund to be shortlisted for 75% of the awards in which it is entered	75%	RH	Applications	Applications	↑ 23.0%
				8	13	
				No. Pending	No. Pending	
				2	0	
				0	3	
				1	10	
				Percentage Shortlisted	Percentage Shortlisted	
	100%	77%				
SICKNESS ABSENCE						
M	Average number of days lost to sickness per FTE member of staff. Sickness absence to be under 6 days per annum per member of staff - cumulative.	6 days	RH	6.4	8.2	↓ -1.8
COST PER MEMBER						
Q	Administration and governance cost per member to be reduced from budgeted figure of £26.51	£ 26.51	DS	£23.11	£20.37	-£2.74
TRAINING HOURS						
Q	Average CPD per Fund employee to be 22 hours or more.	22 Hours	RH	33.8	40.2	↓ -6.4
DATA QUALITY						
M	Common data Main Fund	99%>	RH	96.5%	99.4%	↓ -2.1%
	Common data ITA	99%>		98.0%		
	Conditional data Main Fund	95%>			98.6%	
	Conditional data ITA	95%>				
TRUSTEE TRAINING AND PENSIONS BOARD						
M	Amount of training completed to trustees/board members during the year. (average per member)	22 hours	RH	40.9		
STAFF TURNOVER						
M	Staff turnover to be between 5-10% in a financial year	5% - 10%	All	14.0%	14.4%	↓ -0.4%
AVAILABILITY OF ONLINE SERVICES						
M	Website and web portal to be available 95% of the time (based on working hours as monitored)	95%	AR	99.0%	99.6%	↓ -0.6%
M	Number of occurrences web portal is unavailable	10 per month		3.4		3.4
IDRP						
A	All IDRP cases completed within 60 days	60 days	AR	52.9 days	61.7 days	↓ -8.8
COMPLAINTS MONITORING						
M	All complaints to be completed within 15 working days of receipt	100%	ST	97.7%	99.6%	↓ -1.9%

FREQUENCY KEY	
T	Triennial
A	Annual
Q	Quarterly
6 M	6 Monthly