Objective Reference	<u>No</u>	Freq	<u>Description</u>	<u>Target</u>	<u>Lead</u> <u>Officer</u>		ual (Score nd RAG)	Reporting Period	Reported to:	Previous Score	Date Last Reported		rovement/ erioration
D	1	IMPRO	Funding Level Funding level to increase from current levels of 70% (Taken									L	
		Α	from IAS26 Report)	>70%	GD		75.00%	31/03/13	SMT	75.00%	31/03/10	$\Rightarrow$	0.00%
		l== · ·											
		TRANS	FERS IN  Transfer in quotations processed within 10 days of									I ,	
			receiving all the required information	90%			73.75%			73.75%	Am. 1.4 Man	$\Rightarrow$	0.00%
		М	Transfer notification of transferred in membership to be		ST			Apr-15	SMT		Apr 14 - Mar 15	,	
			notified to the scheme member within 10 days of receiving	90%			46.01%			46.01%	10	$\Rightarrow$	0.00%
		TRANS	payment SFERS OUT										
			Transfer out quotations processed within 20 days	90%			53.85%			49.45%	Apr 14 - Mar		4.40%
		М	Transfer out payments processed within 10 days	90%	ST		36.67%	Apr-15	SMT	99.43%	15	<u> </u>	-2.76%
		RETIRI	EMENTS										
			Retirement options to members within 15 days	90%			21.16%			35.41%		<b>—</b>	-14.25%
			Notification of the actual retirement benefits will be issued to the scheme member within 5 days following receipt of	90%			94.85%			93.87%	Apr 14 - Mar	<b>1</b>	0.98%
		М	the required information.	3076	ST		34.837	Apr-15	SMT	93.8776	15		0.5676
			New retirement benefits processed for payment following	90%			85.91%			89.24%		<b>₽</b>	-3.33%
С	2	D	receipt of election within 5 days	3070			03.3170			03.2470		_	3.3370
		DEFER	RED RETIREMENTS  Retirement options to members within 15 days			l						l	
			The the ment options to members within 15 days	90%			N/A			N/A			N/A
			Notification of the actual retirement benefits will be issued								New KPI wef Apr 15		
		М	to the scheme member within 5 days following receipt of	90%	ST		N/A	N/A	SMT	N/A			N/A
			the required information.				<u>,                                      </u>			,			,
			New retirement benefits processed for payment following	90%			N/A			N/A			N/A
		DEATH	receipt of election within 5 days										
		227111	Acknowledgement of a death to due within 5 days of	0.09/			06.40%			77.000/			10 420/
			receiving the notification.	90%			96.40%			77.98%			18.42%
		м	Notification of benefits payable to dependents will be	90%	ST		72.22%	Apr 15	SMT	68.13%	Apr 14 - Mar 15	<b></b>	4.09%
		IVI	issued within 5 days of receiving the required information	90%	- 31		12.2270	Apr-15		08.13%			4.09%
			Payment of death lump sum will be made within 10 days of	90%			93.10%			98.29%		<u>.</u>	-5.19%
			receipt of all the required information.	9076			93.10%			96.2976		_	-3.1976
		EMPLO	OYER AND MEMBER SERVICE - EMPLOYER SATISFACTION										
		Α	Overall satisfaction score for employers to be 85%.	85%	ST		98.40%	2014/2015	SMT	98.40%	2013/2014	$\Rightarrow$	0.00%
Α	3	EMPLO	DYER AND MEMBER SERVICE - CALLS					<u> </u>			·	<u> </u>	
1		Α	85% of calls received to the customer and employer	85%	ST		100.00%	2014/2015	SMT	<b>100.00%</b>	2013/2014		0.00%
		Α	85% of calls received to the customer and employer helpline to be answered.	85%	ST		100.00%	2014/2015	SMT	100.00%	2013/2014	$\Rightarrow$	0.00%
			' '	85%	ST		100.00%	2014/2015	SMT	100.00%	2013/2014	<b>&gt;</b>	0.00%
С	4	MEME	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY					Apr 14 - Mar			New KPI wef	<b>→</b>	
С			helpline to be answered.	85%	ST ST		98.38%		SMT	N/A		<b>→</b>	0.00% N/A
С	4	MEME Q	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY					Apr 14 - Mar			New KPI wef	<b>⇒</b>	
С	4	MEME Q	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.				98.38% NCHMARK	Apr 14 - Mar		N/A BENCHMARK	New KPI wef		
	4	MEME Q	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE	85%		BE	98.38% NCHMARK 8.64%	Apr 14 - Mar		N/A BENCHMARK 7.97%	New KPI wef		
С	4	MEME Q	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling)	85% VARIANCE		BE	98.38% NCHMARK 8.64% ACTUAL	Apr 14 - Mar		N/A  BENCHMARK 7.97% ACTUAL	New KPI wef	•	
	4	MEME Q INVES	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE	85%	ST	BE	98.38% NCHMARK 8.64%	Apr 14 - Mar 15	SMT	N/A BENCHMARK 7.97%	New KPI wef Apr 15	•	N/A
	4	MEME Q INVES	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling)	85% VARIANCE	ST	BE	98.38% NCHMARK 8.64% ACTUAL 10.26%	Apr 14 - Mar 15	SMT	N/A  BENCHMARK 7.97%  ACTUAL 9.44%	New KPI wef Apr 15	•	N/A
	5	Q INVES	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling)	85% VARIANCE	ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26%  ELATIVE	Apr 14 - Mar 15	SMT	N/A  BENCHMARK 7.97%  ACTUAL 9.44%  RELATIVE	New KPI wef Apr 15	•	N/A
	5	Q INVES	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)	85% VARIANCE +/- 2%	ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26%  ELATIVE 1.62%	Apr 14 - Mar 15 Mar-15	SMT	N/A  BENCHMARK 7.97%  ACTUAL 9.44%  RELATIVE 1.47%	New KPI wef Apr 15	•	N/A 0.15%
	5	Q INVES	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling)  (West Midlands Pension Fund)  IT STATEMENTS  ABS issued to 95% of eligible active members by 31st  August 2015	85% VARIANCE	ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26%  ELATIVE	Apr 14 - Mar 15	SMT	N/A  BENCHMARK 7.97%  ACTUAL 9.44%  RELATIVE	New KPI wef Apr 15	•	N/A
В	5	MEME Q INVES	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TT STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st	85% VARIANCE +/- 2%	ST GD/MC	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26%  ELATIVE 1.62%	Apr 14 - Mar 15 Mar-15	SMT	N/A  BENCHMARK 7.97%  ACTUAL 9.44%  RELATIVE 1.47%	New KPI wef Apr 15	•	N/A 0.15%
В	5	MEME Q INVES	helpline to be answered.  BER SERVICE - CUSTOMER SATISFACTION/SURVEY  Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling)  (West Midlands Pension Fund)  IT STATEMENTS  ABS issued to 95% of eligible active members by 31st  August 2015	85%  VARIANCE +/- 2%	ST GD/MC	BE	98.38%  NCHMARK 8.64% ACTUAL 10.26% ELATIVE 1.62%	Apr 14 - Mar 15 Mar-15	SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%	New KPI wef Apr 15 Feb-15	•	N/A 0.15% -4.00%
В	5	MEME Q INVES M	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  IT STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED	85%  VARIANCE +/- 2%	ST GD/MC	BE	98.38%  NCHMARK 8.64% ACTUAL 10.26% ELATIVE 1.62%	Apr 14 - Mar 15 Mar-15	SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%	New KPI wef Apr 15 Feb-15	•	N/A 0.15% -4.00%
В	5	MEME Q INVES M	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TI STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be	85%  VARIANCE +/- 2%  90% 85%	ST GD/MC	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%	Apr 14 - Mar 15 Mar-15	SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%	New KPI wef Apr 15 Feb-15	•	N/A  0.15%  -4.00%  1.00%
В	5	INVES  M  BENEF	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  IT STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED	85%  VARIANCE +/- 2%	ST ST	BE	98.38%  NCHMARK 8.64% ACTUAL 10.26% ELATIVE 1.62%	Apr 14 - Mar 15 Mar-15	SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%	New KPI wef Apr 15	•	N/A 0.15% -4.00%
С	5	MEME Q INVES M	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  IT STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.	90% 85%	ST GD/MC	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%	Apr 14 - Mar 15 Mar-15 Sep-14 May-14	SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15	•	N/A  0.15%  -4.00%  1.00%
С	5	INVES  M  BENEF	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TI STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be	85%  VARIANCE +/- 2%  90% 85%	ST ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%	Apr 14 - Mar 15 Mar-15	SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar	•	N/A  0.15%  -4.00%  1.00%
С	5	INVES  M  BENEF	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TI STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be	90% 85%	ST ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%	Apr 14 - Mar 15 Mar-15 Sep-14 May-14	SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar	•	N/A  0.15%  -4.00%  1.00%
С	5 6	MEME Q INVES M BENEF A	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be received by the due date.	90% 85%	ST ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%	Apr 14 - Mar 15 Mar-15 Sep-14 May-14	SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar	•	N/A  0.15%  -4.00%  1.00%
С	5 6	MEME Q INVES M BENEF A	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be received by the due date.  AUDIT REPORT  Receive an unqualified audit opinion from the Main Funds	90% 85%	ST ST	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%	Apr 14 - Mar 15 Mar-15 Sep-14 May-14 Apr-15	SMT SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar 15	•	N/A  0.15%  -4.00%  1.00%
С	5 6	MEME Q INVES M BENEF A	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TT STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be received by the due date.  AUDIT REPORT  Receive an unqualified audit opinion from the Main Funds external auditors	90% 85% 90% 85% 98%	ST ST	BE	98.38%  NCHMARK 8.64% ACTUAL 10.26% ELATIVE 1.62%  83%  89%  98.72%  100.00%	Apr 14 - Mar 15 Mar-15 Sep-14 May-14	SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87% 88%  99.18%  100.00%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar	↑ ↑	N/A  0.15%  -4.00%  1.00%  -0.46%  0.00%
С	5 6	MEME Q INVEST  M BENEF  A CONTI	Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TSTATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be received by the due date.  AUDIT REPORT  Receive an unqualified audit opinion from the Main Funds external auditors  Annual audit returns no significant findings	90% 85% 90% 85% 98% 98%	ST  GD/MC  ST  DK	BE	98.38%  NCHMARK 8.64%  ACTUAL 10.26% ELATIVE 1.62%  83%  89%  98.72%  100.00%	Apr 14 - Mar 15  Mar-15  Sep-14  May-14  Apr-15  Apr-15	SMT SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%  99.18%  100.00%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar 15	•	N/A  0.15%  -4.00%  1.00%
C A	5 6	MEME Q INVES M BENEF A	Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TT STATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be received by the due date.  AUDIT REPORT  Receive an unqualified audit opinion from the Main Funds external auditors  Annual audit returns no significant findings  Receive an unqualified audit opinion from the Travel Funds  Receive an unqualified audit opinion from the Travel Funds	90% 85%  98%  98%  Clean Report O significant	ST ST	BE	98.38%  NCHMARK 8.64% ACTUAL 10.26% ELATIVE 1.62%  83%  89%  98.72%  100.00%	Apr 14 - Mar 15 Mar-15 Sep-14 May-14 Apr-15 Apr-15	SMT SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87% 88%  99.18%  100.00%	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar 15  Year to 31/03/2013	↑ ↑	N/A  0.15%  -4.00%  1.00%  -0.46%  0.00%
C A	5 6	MEME Q INVEST  M BENEF  A CONTI	Cumulative satisfaction score of 85% by financial year.  TMENT RETURNS/OVERALL FUND PERFORMANCE  Returns to be within 2% of the benchmark (3 Yr Rolling) (West Midlands Pension Fund)  TSTATEMENTS  ABS issued to 95% of eligible active members by 31st August 2015  DBS issued to 85% of eligible deferred members by 31st August 2015  RIBUTIONS RECEIVED  Main Fund 98% (total value) of contributions to be received by the due date.  Travel Fund 98% (total value) of contributions to be received by the due date.  AUDIT REPORT  Receive an unqualified audit opinion from the Main Funds external auditors  Annual audit returns no significant findings	90% 85%  98%  98%  Clean Report 0 significant findings	ST  GD/MC  ST  DK	BE	98.38%  NCHMARK 8.64% ACTUAL 10.26% ELATIVE 1.62%  98.72%  100.00%  Yes 0	Apr 14 - Mar 15  Mar-15  Sep-14  May-14  Apr-15  Apr-15	SMT SMT SMT SMT	N/A  BENCHMARK 7.97% ACTUAL 9.44% RELATIVE 1.47%  87%  88%  100.00%  Yes  0	New KPI wef Apr 15  Feb-15  Sep-13  Jul-13  Apr 14 - Mar 15  Apr 14 - Mar 15	↑ ↑	N/A  0.15%  -4.00%  1.00%  -0.46%  0.00%

Objective Reference	<u>No</u>	Freq	<u>Description</u>	Target	Lead	Actual (Score	Reporting	Reported to:	Previous	Date Last		ovement/
Kererence					<u>Officer</u>	and RAG)	<u>Period</u>		<u>Score</u>	Reported	Det	<u>erioration</u>
		EXTER	NAL ACCREDITATION			1	1					
						Applications 4			Applications 16			
					RH	No. Pending			No. Pending			
	9					4			4			
		М	The Fund to be shortlisted for all of the awards in which it is entered.	75%		No. Shortlisted	Apr-15	SMT	No. Shortlisted	Apr 14 - Mar 15	Ţ	-58.33%
Α			is entered.			0	1		7	15		
						Percentage			Percentage			
						Shortlisted 0%			Shortlisted 58%			
		^	Retain CSE and IIP accreditations	100%	RH	100%	Apr 15	SMT	100%	New KPI wef	$\Rightarrow$	0.00
		Α	Retain CSE and HP accreditations	100%	КП	100%	Apr-15	SIVIT	100%	Apr 15	7	0.00
A	10	SICKN	ESS ABSENCE									
			Average number of days lost to sickness per FTE member				Apr 15 - May					
		М	of staff. Sickness absence to be under 6 days per annum per member of staff - cumulative.	6 days	ALL	1.03	15		0.58	Apr-15	Ţ	-0.45
			per member of staff - cumulative.									
		COST	PER MEMBER				DA = : 4 =				ı	
Α	11	Α	Administration cost per member to be reduced from budgeted figure of £20.	£20	ALL	£20.57	May 15 (forecast to	SMT	£18.70	Mar-15	Ţ	-£1.87
							year end)				•	
		TRAIN	ING HOURS									
Α	12	Q	Average CPD per Fund employee.	22 hours	ALL	15.34	Mar-15	SMT	10.09	Dec-14	<b>^</b>	5.25
		DATA	OUALITY									
		DATA	QUALITY Common Data									
			Missing forename(s)	0%	_	0.00%			0.00%		$\Rightarrow$	0.00%
			Missing surname	0%	_	0.00%			0.00%		$\Rightarrow$	0.00%
	13		Incorrect gender for member's title  Gender is not male or female	0% 0%	-	0.01%			0.00%	ļ		0.01%
			Invalid or temporary NI number	0%		0.25%			0.38%		<del>-</del>	-0.13%
			Missing date of birth	0%		0.00%			0.00%		$\Rightarrow$	0.00%
			Invalid date of birth (this includes members over 75 and who are still active or members under 16 and not a	0%		0.01%			0.01%	Mar-15	4	0.00%
			beneficiary)	0%	0% ST 0% 0% 0% 0% 0% 0% 0% 0%	0.01%	Jun-15	SMT	0.01%		$\Rightarrow$	0.00%
			Date of birth is after date joined scheme	0%		0.00%			0.00%		$\Rightarrow$	0.00%
Α			Member has no address	0%		1.62%			2.62%		Ŷ	-1.00%
		Q	Missing postcode	0%		1.92%			2.97%		1	-1.05%
			Missing scheme retirement date	0%		0.01%			0.04%			-0.03%
			Missing date joined pensionable service	0%		0.01%			0.00%		<u> </u>	0.01%
			No entry in status history does not match current status	0%		0.01%			0.00%		<b>♣</b>	0.01%
			Last entry in status history does not match current status	0%		0.70%			2.23%		<b>^</b>	-1.53%
			Category of membership status not on member record	0%	1	0.00%			0.00%		$\Rightarrow$	0.00%
			Conditional Data									
			Unavailable at present									
					•						•	
		TRUST	EE TRAINING									
		Q	Satisfaction rate from feedback of trustee training events to be 90%.	90%		0 100.00%	Apr-15	SMT	<b>100.00%</b>	2014/2015	$\Rightarrow$	0.00%
Α	14			050/	RH	N/A	N1/A	CNAT	21/2	New KPI wef		21/2
			Attendance rate of trustees at training events.	85%	_	N/A	N/A	SMT	N/A	Apr 15		N/A
			Amount of training provided to trustees during the year	22 hours		N/A	N/A	SMT	N/A	New KPI wef Apr 15		N/A
		INICOD	MATION TO BE PUBLISHED QUARTERLY									
		INFOR	Expenditure exceeding £500			27-Apr-15			29-Dec-14			
			Transactions on a Government Procurement Card		DK							
				]		27-Apr-15			29-Dec-14			
			Procurement information Invitations to tender for goods and/or services with a value	e 30-Apr-15								
Α	15	Q	that exceeds £5,000.			27-Apr-15	Mar-15	SMT	29-Dec-14	Dec-14		N/A
			Procurement information		יום			]				
			Contracts, commissioned activity, purchase orders,		RH							
			framework agreements and any other legally enforceable			27-Apr-15	1		05-Jan-15			
			agreement with a value that exceeds £5,000.									
			1		Ī	1						

Objective Reference	<u>No</u>	Freq	<u>Description</u>	<u>Target</u>	<u>Lead</u> <u>Officer</u>	Actual (Score and RAG)	Reporting Period	Reported to:	<u>Previous</u> <u>Score</u>	<u>Date Last</u> <u>Reported</u>	Improvement/ Deterioration
		STAFF	TURNOVER								
А	16	Q	Staff turnover to be between 5-10% in a financial year (Calculated as no. of leavers/no. of posts at start of year)	5%-10%	RH	6.93%	Apr 14 - Mar 15	SMT	4.95%	Apr-Dec 14	1.98%
	•										
		AVAIL	ABILITY OF ONLINE SERVICES								
A	17	Q	Website and web portal to be available 95% of the time	95%	RH	N/A	N/A	SMT	N/A	New KPI wef Apr 15	N/A
A	17		Number of members predicted to be registered on web portal by 31 March 2016	50,000		N/A	N/A		N/A	New KPI wef Apr 15	N/A
		QUAR'	TERLY ACCOUNTS								
Α	18	Q	Days taken to prepare quarterly accounts	20 days	DK	N/A	N/A	SMT	N/A	New KPI wef Apr 15	N/A
		QUALI	FICATIONS								
Α	19	Q	At least 75% of staff to hold a relevant qualification	75%	ALL	N/A	N/A	SMT	N/A	New KPI wef Apr 15	N/A

PROTECT

	OBJECTIVES KEY
Α	To be a top performing fund
В	To achieve target investment returns
С	To provide excellent customer service
D	To meet our funding strategy

FREQUENCY KEY			
Α	Annual		
σ	Quarterly		
М	Monthly		