

KPI - DETAILED ACTIONS, TIMESCALE AND REPORTING REQUIREMENTS: To 30 June 2016 - ADDENDUM

<u>No</u>	<u>Description</u>	<u>Target</u>	<u>Lead Officer</u>	<u>No of cases</u>	<u>Actual (Score and RAG)</u>	<u>% Cases Overdue 1-10 Days</u>	<u>% Cases Overdue 11-20 Days</u>	<u>% Cases Overdue 20+ Days</u>
1	FUNDING							
	IMPROVE FUNDING LEVEL Funding level to increase from current levels of 72%	100%	PT		86.3%			
2	PENSION ADMINISTRATION							
	DEATH BENEFITS Notify potential beneficiary of lump sum death in service grant within 5 days	95%		5	100.0%			
	Write to dependant and provide relevant claim form within 5 days of notification of death	90%	JB	91	79.0%	19.0%	0.0%	2.0%
	Pay death grant within 5 days of receipt of relevant documentation	90%		41	80.0%	10.0%	10.0%	0.0%
	Issue notification of dependant's pension within 5 days of receipt of relevant claim forms	90%		41	80.0%	10.0%	10.0%	0.0%
	RETIREMENTS Employer decision and options to members within 10 days	90%	JB	175	60.0%	15.0%	10.0%	15.0%
	New retirement benefits processed for payment following receipt of election within 10 days	95%		238	91.0%	6.0%	3.0%	0.0%
	ILL HEALTH RETIREMENTS Retirement options to members within 10 days	90%	JB	16	88.0%	12.0%	0.0%	0.0%
	New retirement benefits processed for payment following receipt of election within 10 days	95%		16	100.0%			
	BENEFIT STATEMENTS ABS issued to 95% of eligible active members by 30th September	95%			Issued mid-September			

KPI - DETAILED ACTIONS, TIMESCALE AND REPORTING REQUIREMENTS: To 30 June 2016 - ADDENDUM

<u>No</u>	<u>Description</u>	<u>Target</u>	<u>Lead Officer</u>	<u>No of cases</u>	<u>Actual (Score and RAG)</u>	<u>% Cases Overdue 1-10 Days</u>	<u>% Cases Overdue 11-20 Days</u>	<u>% Cases Overdue 20+ Days</u>
3	CUSTOMER SERVICE							
	EMPLOYER SATISFACTION/SURVEY Overall satisfaction score for employers to be 80%	80%	JB/NIM		82%			
	MEMBER SATISFACTION/SURVEY Overall satisfaction score for members to be 80%	80%	JB		81%			
4	INVESTMENT PERFORMANCE							
	INVESTMENT RETURNS/OVERALL FUND PERFORMANCE Returns to at least match the benchmark	Benchmark	PT		BENCHMARK 5.3% ACTUAL 5.0%			
5	DATA							
	DATA QUALITY Common data quality within the Fund should be at least 90% accurate.	90%	JB		TBC			
6	CONTRIBUTIONS							
	CONTRIBUTIONS RECEIVED Pension Fund 100% (total value) of contributions to be received by 21st day of the ensuing period.	100%	PT		98%			
7	AUDIT							
	CLEAN AUDIT REPORT Receive an unqualified audit opinion from the external auditors	Unqualified	PT/IR /		Achieved			