

PENSIONS SECTION ADMINISTRATION

APPENDIX 3A to Budget Monitoring Report at 31st July 2010

Key Performance Indicators

INDICATOR	Green Red Amber	Reporting Dept	2009/10 Actual	Target for 2010/11	Actual - 3 months to 31/07/2010	Comment
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A Customer Perspective

1a	General Satisfaction with Service - clinic feedback	G	Admin	97%	95%	99%	4 clinics held during period.	Graph 1
1b	General Satisfaction with Service - retirees feedback	G	Admin	95%	95%	90%+	Generally good from response from retirees	
2	Percentage Compliance with Charter Mark criteria	G	Admin	90%	95%	97%	Chartermark Accreditation obtained as part of B&NES Finance in 2008 - re-assessment is due in 2011	
3	Level of Equalities Standard for Local Government	G	Admin	100%	100%	100%	Level 3 obtained by B&NES in June 2010	
4a	Service Standards - Processing tasks within internal targets (SLA)							
	Deaths [12 days]	A	Admin	89%	90%	57.58%	19 of 33 tasks were completed within target.	
	Retirements [15 days]	A	Admin	70%	90%	86.47%	390 of 451 tasks were completed within target.	
	Leavers (Deferreds) [20 days]	R	Admin	82%	75%	43.33%	510 of 1177 tasks were completed within target.	
	Refunds [5 days]	G	Admin	62%	60%	93.33%	84 of 90 tasks were completed within target.	
	Transfer Ins [20 days]	A	Admin	65%	75%	79.50%	128 of 161 tasks were completed within target.	
	Transfer Outs [15 days]	A	Admin	50%	75%	85.42%	82 of 96 tasks were completed within target.	
	Estimates [10 days]	G	Admin	91%	90%	94.16%	677 of 719 tasks were completed within target.	
4b	Service Standards Processing tasks within statutory limits	G	Admin	100%	100%	100%	Should always be 100%	
5	Number of complaints	G	Admin	22	0	0	No complaints received in the period	
6	Pensions paid on time	G	Admin	100%	100%	100%	All paid on time	
7	Statutory Returns sent in on time (SF3/CIPFA)	G	Admin	n/a	100%	100%	Should always be 100%	
8	Number of hits per period on APF website	G	Admin	44743	18000p/a 1500p/m	11375	3791 per calendar month . More than double target	Graph 2
9	Advising members of Reg Changes within 3 months of implementation	G	Admin	100%	100%	100%	Should always be 100%	
10	Issue of Newsletter (Active & Pensioners)	G	Admin	100%	100%	100%	Should always be 100%	
11	Annual Benefit Statements distributed by year end	G	Admin	70%	100%	100%	All sent by year end	

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B People Perspective

1	Health & Safety Compliance	G	All	100%	100%	100%	Should always be 100%			
2	% of staff with Investor in People Award (IIP)	G	All	0%	100%	100%	n/a - reassessment due late Summer 2010			
3	% of new staff leaving within 3 months of joining	G	All	0%	4%	0%	Well within target			
4	% of staff with up to date Performance Reviews	G	All	97%	100%	n/a	None due in this period			
5	% Sickness Absence	a) Short Term	b) Long Term	G	All	2.50%	a) 3% b) 3%	a) 1.4% b) 0%	Ahead of APF target and well ahead of corporate target of 5%	Chart 3
6	% of staff with an up to date training plan	G	All	100%	100%	100%	Each person has a Personal Development Plan Folder. Program of courses (internal & external) in place for 2009/10. Training needs identified at performance reviews.			

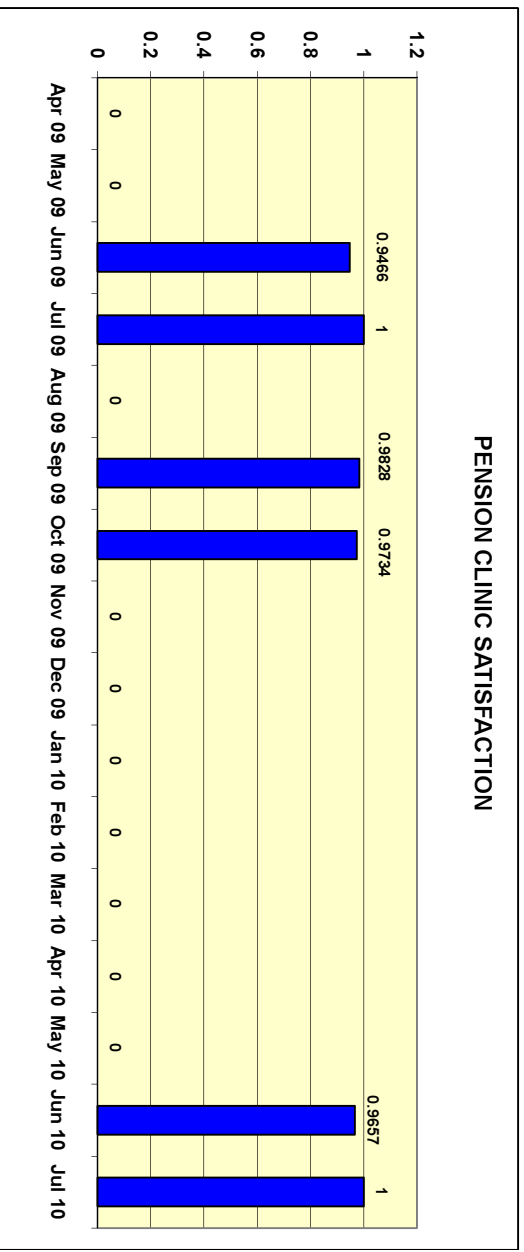
C Process Perspective

1	a) 5 Services actually delivered & b) electronically & services capable of delivery to members	A	Admin	a) 0.3% b) 100%	a) 4% 100%	b) a) 0.3% b) 100%	a) 0.03% represents the members who agreed receive the Newsletter electronically. Gandlake initiative means that over 1500 members are happy to receive info electronically b) Section able to deliver all targeted services electronically	
2	% Telephone answered within 20 seconds	G	Admin	99%	98%	99.45%	9172 calls, 9120 answered within 20 seconds	Graph 4
3	% Complaints dealt with within Corporate Standards	G	Admin	100%	100%	100%	Should never be less than 100%	
4	Letters answered within corporate standard	G	Admin	95%	95%	100%	Ahead of target	
5	Maintain work in progress/outstanding at below 10%	G	Admin	10.59%	10%	4.65%	5121 Created, 4883 cleared (95.35.% leaving 4.65% of workload outstanding) Ahead of target	Graphs 5 6 & 7)
6	Collection of Pension Contributions:- a) % Received late b) Total Value of late contributions	G	Accounts	a) 6% b) 0.05%	a) 0% b) 0%	a) 1.4% b) 0.005%	Over the 3 month period only 2 small employers out of 108 employers remitted their contributions late. No persistent late-payers. Average delay of late payers 5 days. Employers are reminded regularly of their legal obligations to pay on time and the possibility (under the 2007 Admin Regs) of billing them for extra charges if unnecessary additional work is created for APF.	
7	Year End update procedures (conts & salaries received by 31/08/2010)	G	Admin	81%	100%	100%	Returns from Employers of member contributions for 2009/10 and Pen Rems at 31.03.2010 were due in by mid May 2010 and most were received by that date - all were received and updated by the target date of 31.08.2010. Records updated and sent to Actuary for tri-ennial valuation in July. APF are preparing 2010 Annual Benefit Statements to go out starting in October 2010.	
8	No. of customer errors (due to incomplete data)	G	Admin	2%	3%	2%	Acceptable error level	

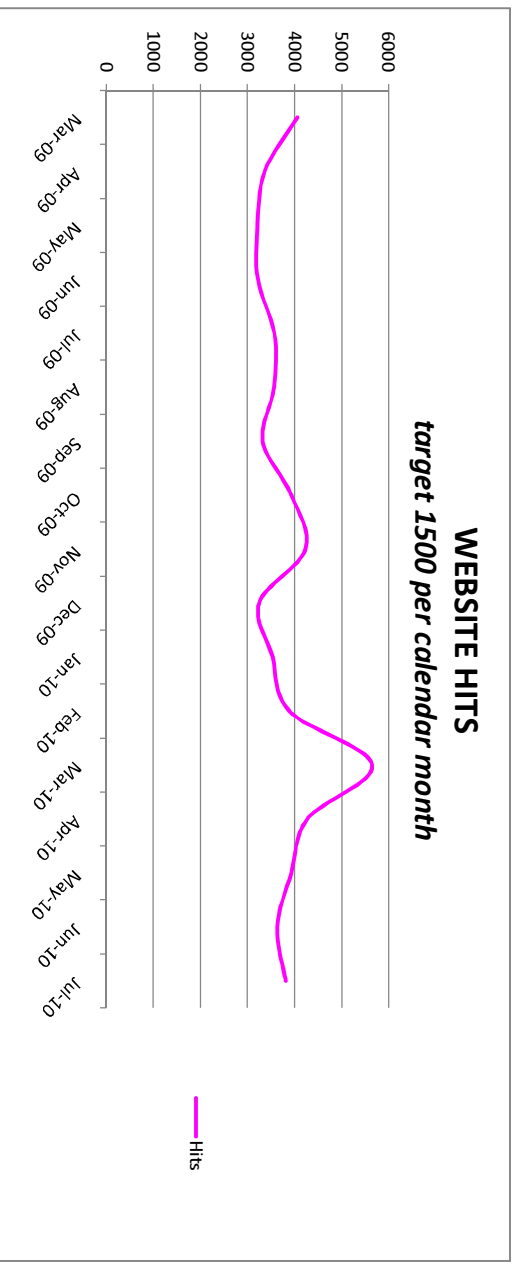
D Resource Perspective

1	% Supplier Invoices paid within 30 day or mutually agreed terms	G	Admin	91%	94%	94.05%	Business Financial Services (inc Pensions) figure is for 2 months (July figure not available yet) On target.	
2	Temp Staff levels (% of workforce)	G	All	0.40%	3%	2.54%	Below target - temporary admin assistant post from September 2009 as a result of acting ups on staff maternity absence.	
3	% of IT plan achieved against target	R	Tech & Dev	24%	100% (25% p/q)	20%	EDI progressing slow. The new Admin Strategy will be used to encourage employers to provide information electronically as the norm by April 2012. A promotional campaign will start in 2011.	
4	% of Training Plan achieved against target	G	Tech & Dev	100%	100%	100%	Staff training requirements for all staff identified from 2009 annual performance reviews. A programme of courses (internal & external) is in place for 2010 to meet these needs.	

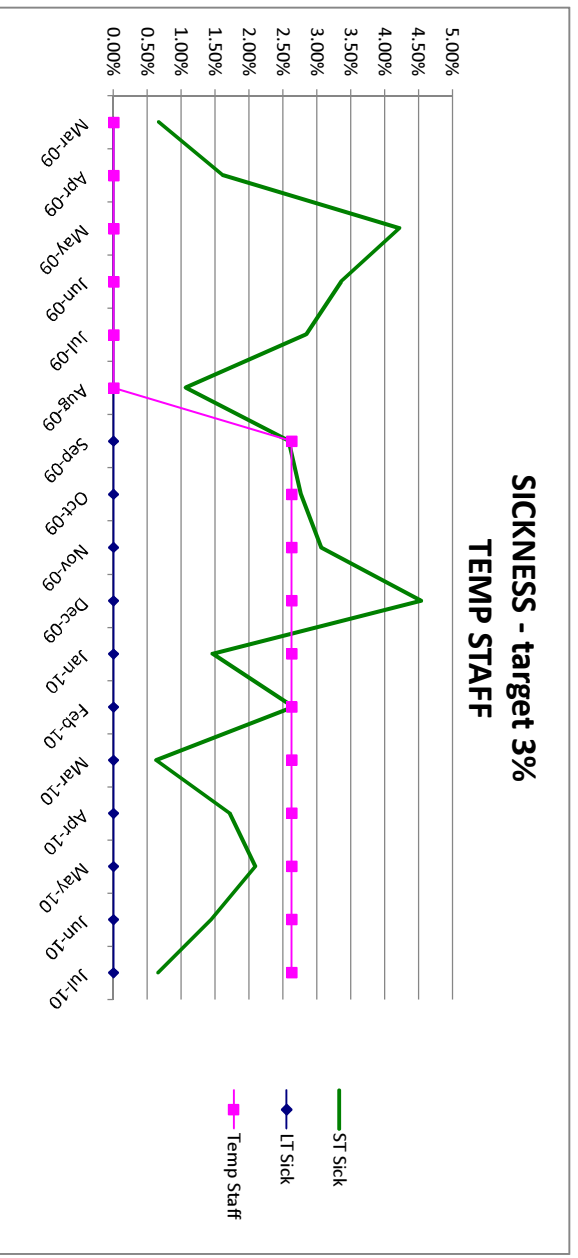
1 APPENDIX 3B to Budget Monitoring Report at at 31st July 2010: selected items in GRAPH format



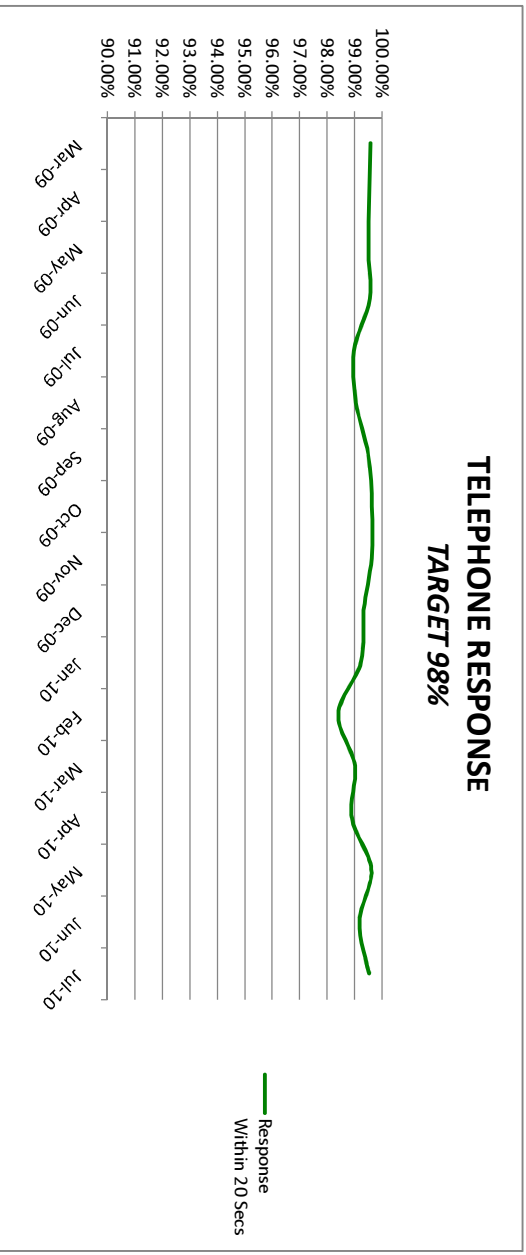
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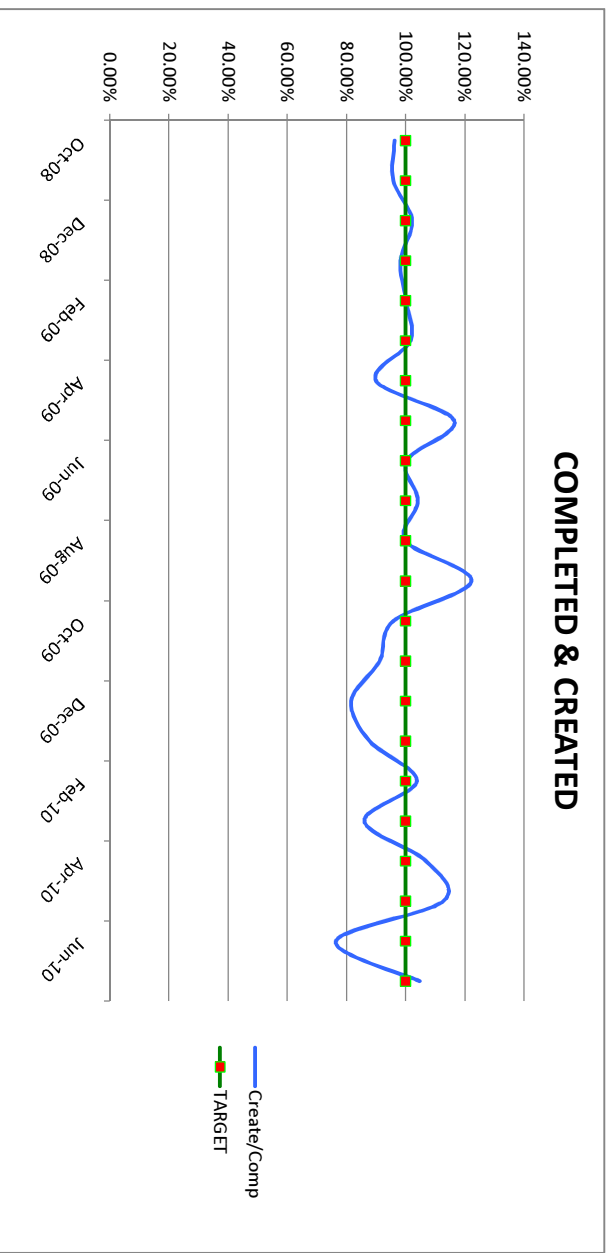
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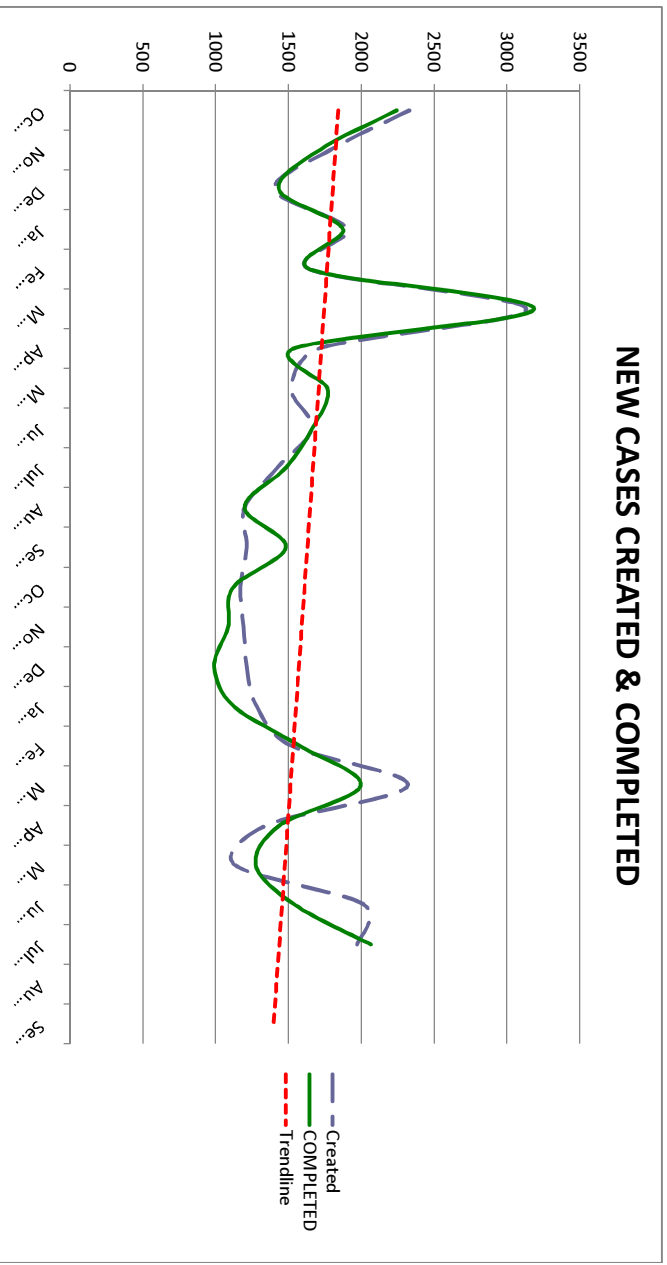
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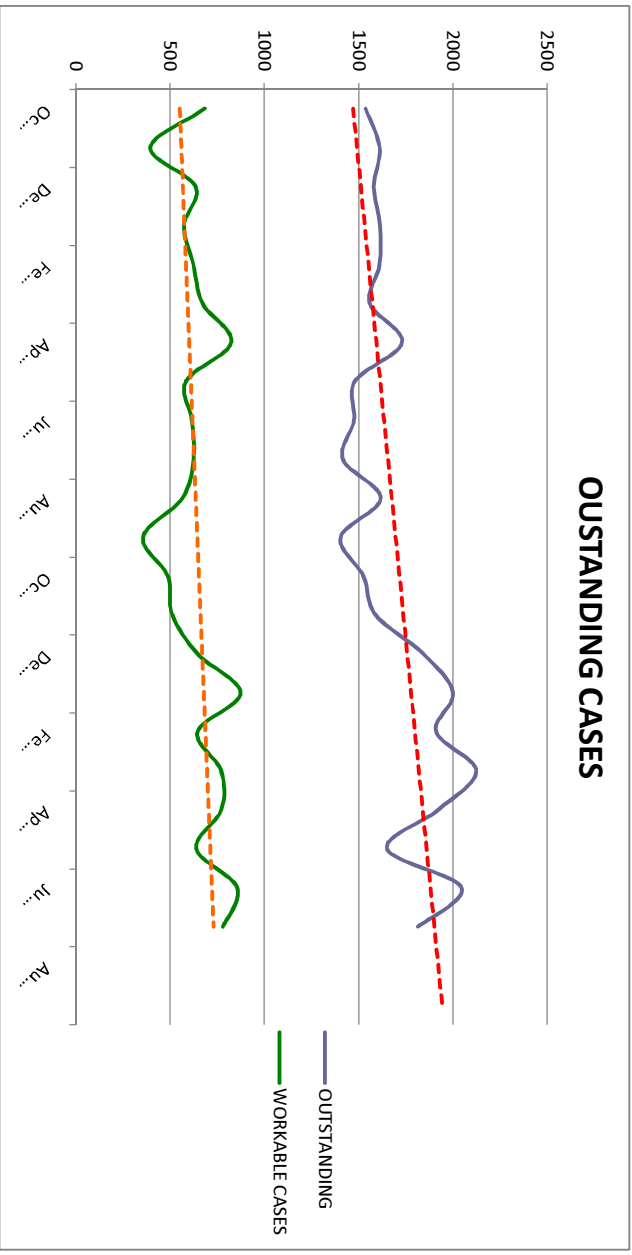


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	MONTH1			MONTH2			MONTH3			MONTH4						
DEATHS	5	5	10	10	2	12	4	7	11				19	14	33	57.58%
DEFERREDS	66	194	260	92	204	296	352	269	621				510	667	1177	43.33%
ESTIMATES	210	11	221	209	9	218	258	22	280				677	42	719	94.16%
REFUNDS	27	1	28	23	3	26	34	2	36				84	6	90	93.33%
RETIREMENTS	131	20	151	127	7	134	132	34	166				390	61	451	86.47%
TV INS	54	9	63	48	11	59	26	13	39				128	33	161	79.50%
TV OUTS	43	10	47	22	4	26	17	6	23				82	20	96	85.42%
													1890	843	2727	69.31%

Data Taken from 3 month performance tab on Monthly Stats spreadsheet