

PENSIONS SECTION ADMINISTRATION

APPENDIX 3A to Budget Monitoring Report at 31st October 2012

Key Performance Indicators

INDICATOR	Green Red Amber	Reporting Dept	2011/12 Actual	Target for 2012/13	Actual - 3 months to 31/10/2012	Comment
Customer Perspective						
General Satisfaction with Service - clinic feedback	G	Admin	100%	95%	0.00%	No clinics held during period and none planned for 2012.
General Satisfaction with Service - retirees feedback	G	Admin	96%	95%	98.49%	Generally very good response from retirees (See Appendices 4A & 4B)
Percentage Compliance with Charter Mark criteria	G	Admin	100%	95%	n/a	Chartermark Accreditation obtained as part of B&NES Finance in 2008: discontinued from 2011 (<i>item will be removed from next report</i>)
Level of Equalities Standard for Local Government	G		100%	100%	100%	Fully Compliant
Service Standards - Processing tasks within internal targets (SLA)						
Deaths [12 days]	G	Admin	60%	90%	90.00%	18 of 20 Tasks were completed within target
Retirements [15 days]	G	Admin	53%	90%	92.93%	486 of 523 Tasks were completed within target
Leavers (Deferreds) [20 days]	G	Admin	53%	75%	71.32%	741 of 1039 Tasks were completed within target
Refunds [5 days]	G	Admin	71%	75%	86.96%	60 of 69 Tasks were completed within target
Transfer Ins [20 days]	A	Admin	24%	75%	56.30%	67 of 119 Tasks were completed within target
Transfer Outs [15 days]	G	Admin	30%	75%	82.64%	100 of 121 Tasks were completed within target
Estimates [10 days]	G	Admin	89%	90%	97.89%	880 of 899 Tasks were completed within target
Service Standards Processing tasks within statutory limits	G	Admin	100%	100%	100%	
Number of complaints	G	Admin	0	0	0	Again, no complaints in this period- none received within last 2yrs
Pensions paid on time	G	Admin	100%	100%	100%	All paid on time
Statutory Returns sent in on time (SF3/CIPFA)	G	Admin	on time	100%	100%	Due next quarter
Number of hits per period on APF website	G	Admin	49256	36000p/a 3000p/q	12045	4015 per calendar month for reporting period
Advising members of Reg Changes within 3 months of implementation	G	Admin	100%	100%	n/a	None this quarter
Issue of Newsletter (Active & Pensioners)	G	Admin	100%	100%		None sent in this quarter.
Annual Benefit Statements distributed by year end	G	Admin	92%	100%	100%	2012 ABSs all sent out by end of October

Graph 1

People Perspective

Health & Safety Compliance			G	All	100%	100%	100%		
% of staff with Investor in People Award (IIP)			G	All	0%	100%	100%	n/a - re- awarded in Summer 2010	
% of new staff leaving within 3 months of joining			G	All	0%	4%	0%	One leaver in period but he had than 3 months service	
% of staff with up to date Performance Reviews			G	All	97%	100%	n/a	None due in this period but he had than 3 months service	
% Average Sickness Absence	a) Short Term	b) Long Term	G	All	2.50%	a) 3% b) 3%	a) 1.37 b) 0%	Well ahead of APF target and well ahead of corporate target of 5%	Graph 2
% of staff with an up to date training plan			G	All	100%	100%	100%	Staff training requirements for all staff identified from Staff meeting in 2010 Courses (internal & external) are open to relevant staff as when available, services bought in where bulk training necessary.	

Process Perspective

a) Services actually delivered electronically	b) Services <i>capable</i> of delivery to members	A	Admin	a) 0.3% b) 100%	a) 4% b) 100%	a) 0.3% b) 100%	a) 0.03% represents the members who agreed receive the Newsletter electronically. Internet Access means that over 2000 members are happy to receive info electronically b) Section able to deliver all targeted services electronically		
Telephone calls received in period			G	Admin	8664 per quarter	not applicable	8874	First time the number of calls has been specifically included and a replacement graph (see 2b) below)	Graph 3
% Telephone calls answered within 20 seconds			G	Admin	99%	98%	98%	8675 of the 8874 calls, answered within 20 second. As target is almost always achieved or exceeded previous graph has been replaced by one showing the number of calls received	
% Complaints dealt with within Corporate Standards			G	Admin	100%	100%	100%	On target	
Letters answered within corporate standard			G	Admin	100%	95%	100%	Ahead of target	
Cases received and cleared Target is to maintain work in progress/outstanding below 10% .			G	Admin	5.77%	10%	2.52%	5864 Created, 5717 cleared (97.48.% leaving only 2.52% of workload outstanding). Well ahead of target	Graphs 4, 5 & 6
Collection of Pension Contributions:- a) % employers received late b) Total Value of late contributions			G	Accounts	a) 6% b) 0.05%	a) 0% b) 0%	a) 1.78% b) 0.7%	3 out of 168 employers sent their contributions in late. Late contributions include an estimated £223,000 from Bristol City Council in relation to Local Authority Schools that have outsourced their payroll. We are in contact with Bristol CC in regard to their resolving this issue. Where material, interest on late payments will be charged at base rate plus 1% in accordance with the 2008 regulations.	
Year End update procedures (conts & salaries received by 31/08/2012)			G	Admin	81%	100%	98%	Pen Conts and Pen Rems now received from all but 3 small employers (See Appendix 7 of Summary Performance Report for full details)	
No. of customer errors (due to incomplete data)			G	Admin	2%	3%	2%	Acceptable error level	

Resource Perspective

% Supplier Invoices paid within 30 day or mutually agreed terms			G	Admin	93%	94%	84.85%	Business Financial Services (inc Pensions) figure is below target - tis is unusual
Temp Staff levels (% of workforce)			G	All	0.37%	3%	0.00%	
% of IT plan achieved against target			G	Supp & Dev	24%	100% (25% p/q)	20%	EDI progress has been slow. The Admin Strategy will be used to encourage employers to provide information electronically as the norm. New Employer Access module to be rolled out in 2011 will allow employers to key information electronically into the pensions database.
% of Training Plan achieved against target			G	Supp & Dev	100%	100%	100%	Staff training requirements for all staff identified from Staff meeting in 2010 new form set up to use at 1 - 1 meetings to supplement Performance Review assessment. Courses (internal & external) are open to relevant staff as when available, services bought in where bulk training necessary.