

# PENSIONS SECTION ADMINISTRATION

APPENDIX 3A to Budget Monitoring Report at 31st January 2013

## Key Performance Indicators

INDICATOR	Green Red Amber	Reporting Dept	2011/12 Actual	Target for 2012/13	Actual - 3 months to 31/01/2013	Comment
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### A Customer Perspective

1a	General Satisfaction with Service - clinic feedback	<b>G</b>	Admin	99%	95%	0.00%	0 clinics held during period.	<b>Graph 1</b>
1b	General Satisfaction with Service - retirees feedback	<b>G</b>	Admin	96%	95%	96.00%	Generally good from response from retirees	
2	Percentage Compliance with Charter Mark criteria	<b>G</b>	Admin	90%	95%	97%	Chartermark Accreditation obtained as part of B&NES Finance in 2008	
3	Level of Equalities Standard for Local Government	<b>G</b>		100%	100%	100%	Compliant	
4a	Service Standards - Processing tasks within internal targets (SLA)							
	Deaths [12 days]	<b>G</b>	Admin	60%	<b>90%</b>	<b>70.00%</b>	14 of 20 Tasks were completed within target	
	Retirements [15 days]	<b>G</b>	Admin	53%	<b>90%</b>	<b>91.67%</b>	385 of 420 Tasks were completed within target	
	Leavers (Deferreds) [20 days]	<b>A</b>	Admin	53%	<b>75%</b>	<b>54.47%</b>	804 of 1,476 Tasks were completed within target	
	Refunds [5 days]	<b>G</b>	Admin	71%	<b>75%</b>	<b>88.75%</b>	71 of 80 Tasks were completed within target	
	Transfer Ins [20 days]	<b>A</b>	Admin	25%	<b>75%</b>	<b>45.95%</b>	68 of 148 Tasks were completed within target	
	Transfer Outs [15 days]	<b>G</b>	Admin	29%	<b>75%</b>	<b>74.49%</b>	73 of 98 Tasks were completed within target	
	Estimates [10 days]	<b>G</b>	Admin	89%	<b>90%</b>	<b>97.42%</b>	870 of 893 Tasks were completed within target	
4b	Service Standards Processing tasks within statutory limits	<b>G</b>	Admin	100%	100%	100%		
5	Number of complaints	<b>G</b>	Admin	2	0	0	No complaints received in the period	
6	Pensions paid on time	<b>G</b>	Admin	100%	100%	100%	All paid on time	
7	Statutory Returns sent in on time (SF3/CIPFA)	<b>G</b>	Admin	on time	100%	100%	due next quarter	
8	Number of hits per period on APF website	<b>G</b>	Admin	66847	36,000p/a 3,000p/q	11,045	3,681 per calendar month for reporting period	<b>Graph 2</b>
9	Advising members of Reg Changes within 3 months of implementation	<b>G</b>	Admin	100%	100%	n/a	none this quarter	
10	Issue of Newsletter (Active & Pensioners)	<b>G</b>	Admin	100%	100%	n/a	due next quarter	
11	Annual Benefit Statements distributed by year end	<b>G</b>	Admin	70%	100%	n/a	due next quarter	

## B People Perspective

1	Health & Safety Compliance		<b>G</b>	All	100%	100%	100%		
2	% of staff with Investor in People Award (IIP)		<b>G</b>	All	0%	100%	100%	n/a - re- awarded in Summer 2010	
3	% of new staff leaving within 3 months of joining		<b>G</b>	All	0%	4%	0%		
4	% of staff with up to date Performance Reviews		<b>G</b>	All	97%	100%	n/a	None due in this period	
5	% Sickness Absence	a) Short Term b) Long Term	<b>G</b>	All	2.21%	a) 3% b) 3%	a)1.35 b) 0%	Ahead of APF target and well ahead of corporate target of 5%	<b>Chart 3</b>
6	% of staff with an up to date training plan		<b>G</b>	All	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.	

## C Process Perspective

1	a) Services actually delivered electronically b) Services <i>capable</i> of delivery to members		<b>A</b>	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	
2	% Telephone answered within 20 seconds		<b>G</b>	Admin	99%	98%	97.2%	7274 calls, 7068 answered within 20 seconds	<b>Graph 4</b>
3	% Complaints dealt with within Corporate Standards		<b>G</b>	Admin	100%	100%	100%		
4	Letters answered within corporate standard		<b>G</b>	Admin	95%	95%	100%	Ahead of target	
5	Maintain work in progress/outstanding at <b>below 10%</b>		<b>G</b>	Admin	3.73%	10%	0.00%	5441 Created, 6144 cleared ( <b>113.00%</b> leaving 0.00% of current workload outstanding) . 703 cases of old work cleared	<b>Graphs 5 &amp; 7)</b>
6	Collection of Pension Contributions:- a) % Number Received late b) Late contributions as % of Total Value		<b>G</b>	Accounts	a) 6% b) 0.05%	a) 0% b) 0%	a) 0.6%% b) 0.06%	1 out of 175 employers sent their contributions in late for one month only. 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		<b>G</b>	Admin	81%	100%	n/a	Send out year end letter in next period	
8	No. of customer errors (due to incomplete data)		<b>G</b>	Admin	2%	3%	2%	Acceptable error level	

## D Resource Perspective

1	% Supplier Invoices paid within 30 day or mutually agreed terms		<b>G</b>	Admin	91%	<b>90%</b>	89.00%	Business Financial Services (inc. Pensions) figure is marginally below target. Target reduced by B&NES in 2012 to 90%	
2	Temp Staff levels (% of workforce)		<b>G</b>	All	3.67%	3%	0.00%	No temps in period so below target	
3	% of IT plan achieved against target		<b>R</b>	Supp & Dev	24%	100% (25% p/q)	20%	EDI progress has been slow so the basis of updating is changing The Admin Strategy is being used to encourage employers to provide information electronically as the norm. Employer Access module rolled out in 2011 has been updated to allow employers to key in changes on line into electronically into the APF pensions database.	
4	% of Training Plan achieved against target		<b>G</b>	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.	