

# PENSIONS SECTION ADMINISTRATION

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

## Key Performance Indicators

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

General Satisfaction with Service - clinic feedback	<b>G</b>	Admin	97%	95%	99%	7 clinics held during period.	<b>Graph 1</b>
General Satisfaction with Service - retirees feedback	<b>G</b>	Admin	95%	95%	90%+	Generally good from response from retirees	
Percentage Compliance with Charter Mark criteria	<b>G</b>	Admin	90%	95%	97%	Quality and in particular confidentiality of venue was the least well-scored. Concentrating on this for future See separate appendix	
Level of Equalities Standard for Local Government	<b>G</b>	Admin	100%	100%	100%	Chartermark Accreditation obtained as part of B&NES Finance in 2008 - re-assessment is due in 2011	
Service Standards - Processing tasks within internal targets (SLA)							
Deaths [12 days]	<b>A</b>	Admin	89%	90%	90.91%	20 of 22 tasks were completed within target.	
Retirements [15 days]	<b>A</b>	Admin	70%	90%	74.74%	354 of 480 tasks were completed within target.	
Leavers (Deferreds) [20 days]	<b>R</b>	Admin	82%	75%	71.72%	606 of 845 tasks were completed within target.	
Refunds [5 days]	<b>G</b>	Admin	62%	60%	73.71%	30 of 41 tasks were completed within target.	
Transfer Ins [20 days]	<b>A</b>	Admin	65%	75%	25.00%	28 of 112 tasks were completed within target.	
Transfer Outs [15 days]	<b>A</b>	Admin	50%	75%	41.38%	36 of 87 tasks were completed within target.	
Estimates [10 days]	<b>G</b>	Admin	91%	90%	94.16%	935 of 993 tasks were completed within target.	
Service Standards Processing tasks within statutory limits	<b>G</b>	Admin	100%	100%	100%	Should always be 100%	
Number of complaints	<b>G</b>	Admin	22	0	0	No complaints received in the period	
Pensions paid on time	<b>G</b>	Admin	100%	100%	100%	All paid on time	
Statutory Returns sent in on time (SF3/CIPFA)	<b>G</b>	Admin	n/a	100%	100%	Should always be 100%	
Number of hits per period on APF website	<b>G</b>	Admin	44743	36000p/a 3000p/q	13614	4538 per calendar month for reporting period - ahead of target	<b>Graph 2</b>
Advising members of Reg Changes within 3 months of implementation	<b>G</b>	Admin	100%	100%	100%	Should always be 100%	
Issue of Newsletter (Active & Pensioners)	<b>G</b>	Admin	100%	100%	100%	Should always be 100%	
Annual Benefit Statements distributed by year end	<b>G</b>	Admin	70%	100%	100%	Councillors and deferred member statements sent by 30.09.2010	

### People Perspective

Health & Safety Compliance	<b>G</b>	All	100%	100%	100%	Should always be 100%				
% of staff with Investor in People Award (IIP)	<b>G</b>	All	0%	100%	100%	n/a - reassessment due in November 2010				
% of new staff leaving within 3 months of joining	<b>G</b>	All	0%	4%	0%	No leavers in this period				
% of staff with up to date Performance Reviews	<b>G</b>	All	97%	100%	n/a	None due in this period				
% Sickness Absence		a) Short Term	b) Long Term	<b>G</b>	All	2.50%	a) 3% b) 3%	a) 1.28% b) 0%	Ahead of APF target and well ahead of corporate target of 5%	<b>Chart 3</b>
% of staff with an up to date training plan	<b>G</b>	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.				

### Process Perspective

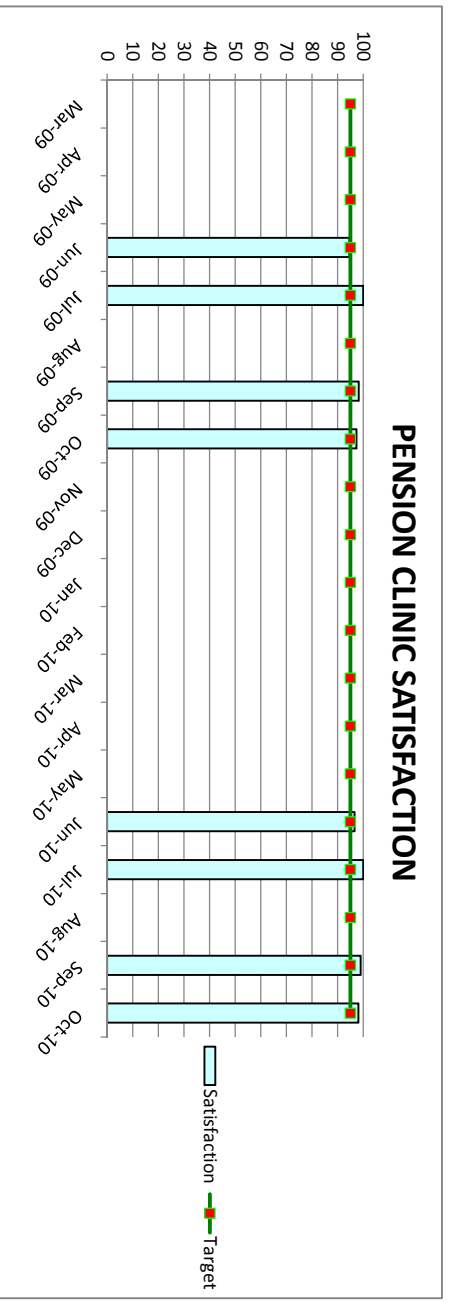
a) 5 Services actually delivered & b) electronically & services capable of delivery to members	<b>A</b>	Admin	a) 0.3% b) 100%	a) 4% b) 100%	a) 0.3% b) 100%	a) 0.03% represents the members who agreed receive the Newsletter electronically. Former Gandlake initiative (now Heywood) means that over 1500 members are happy to receive info electronically b) Section able to deliver all targeted services electronically	
% Telephone answered within 20 seconds	<b>G</b>	Admin	99%	98%	99.18%	7774 calls, 7711 answered within 20 seconds	<b>Graph 4</b>
% Complaints dealt with within Corporate Standards	<b>G</b>	Admin	100%	100%	100%	Should never be less than 100%	
Letters answered within corporate standard	<b>G</b>	Admin	95%	95%	100%	Ahead of target	
Maintain work in progress/outstanding at <b>below 10%</b>	<b>G</b>	Admin	10.59%	10%	4.72%	3864 Created, 3678 cleared ( 95.18.% leaving 4.72% of workload outstanding). Ahead of target.	<b>Graphs 5 &amp; 7)</b>
Collection of Pension Contributions:- a) % Received late b) Total Value of late contributions	<b>G</b>	Accounts	a) 6% b) 0.05%	a) 0% b) 0%	a) 2.5% b) 0.05%	Av of less than 3 out of 108 employers sent their contributions in late. No persistent late-payers. Average delay of late payers 3 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.	
Year End update procedures (conts & salaries received by 31/08/2010)	<b>G</b>	Admin	81%	100%	100%	All Pen Conts and Pen Rems now received however B&NES were very late in submitting theirs and the first return was inaccurate.	
No. of customer errors (due to incomplete data)	<b>G</b>	Admin	2%	3%	2%	Acceptable error level	

### Resource Perspective

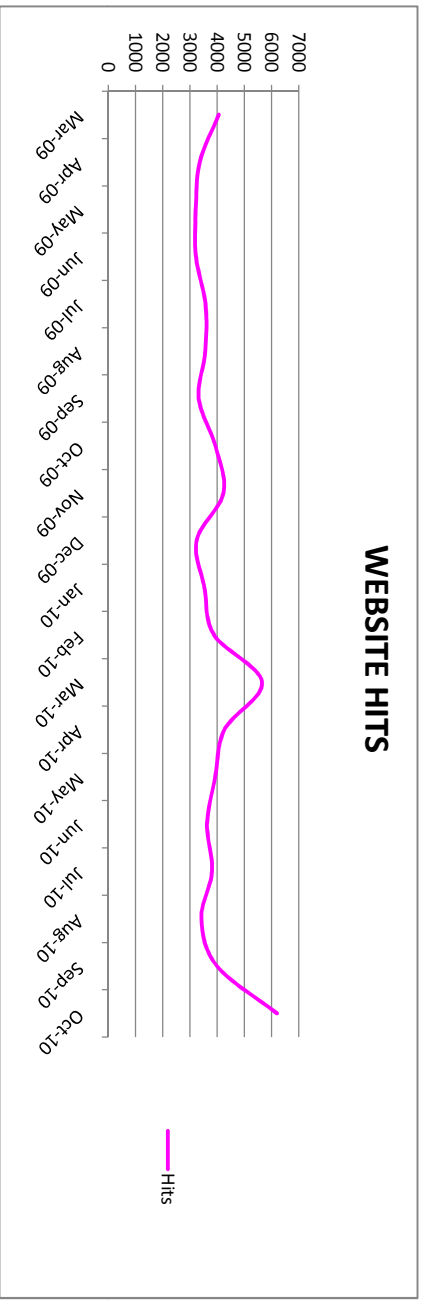
% Supplier Invoices paid within 30 day or mutually agreed terms	<b>G</b>	Admin	91%	94%	95.34%	Business Financial Services (inc Pensions) figure is marginally below target	
Temp Staff levels (% of workforce)	<b>G</b>	All	0.40%	3%	5.26%	Above target - due to temporary admin assistant post from July to fill in for another temp who is covering for staff maternity leave. Post ceased November 26th 2010	<b>Chart 3</b>
% of IT plan achieved against target	<b>R</b>	Tech & Dev	24%	100% (25% p/q)	20%	EDI progress remains slow. However, encouraging signs from 2 unitaries who are in talks with their payroll providers to provide standard reports. The new Admin Strategy will be used to encourage employers to provide information electronically as the norm -targets to comply set for April 2012 (med/large) and October 2012 (smaller).	

% of Training Plan achieved against target	<b>G</b>	All	100%	100%	100%	Staff training requirements for all staff identified from 2009 annual performance reviews. An extensive programme of courses (internal & external) are being is in place for 2010 to meet these needs.
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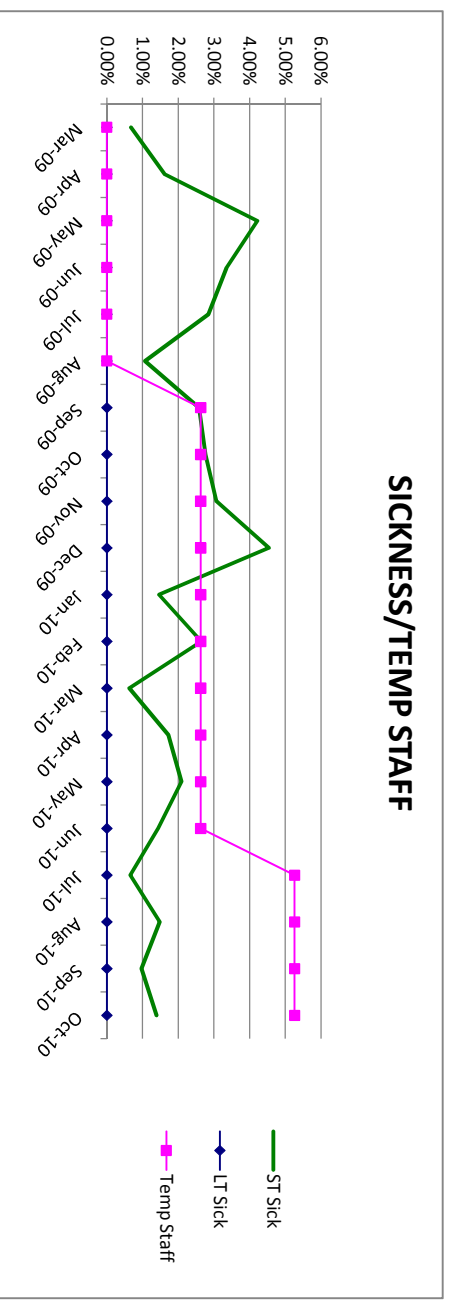
**1 APPENDIX 3B to Budget Monitoring Report at 31st October 2010: selected items in GRAPH format**



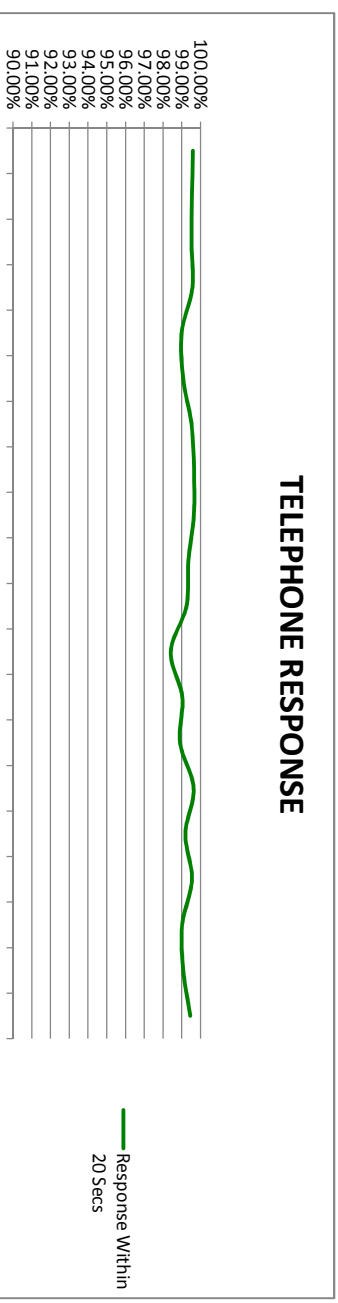
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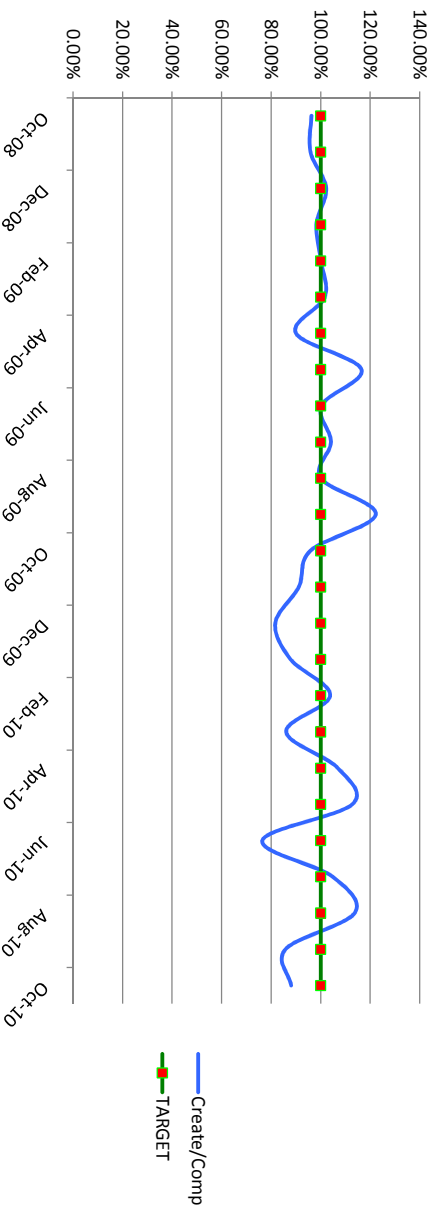


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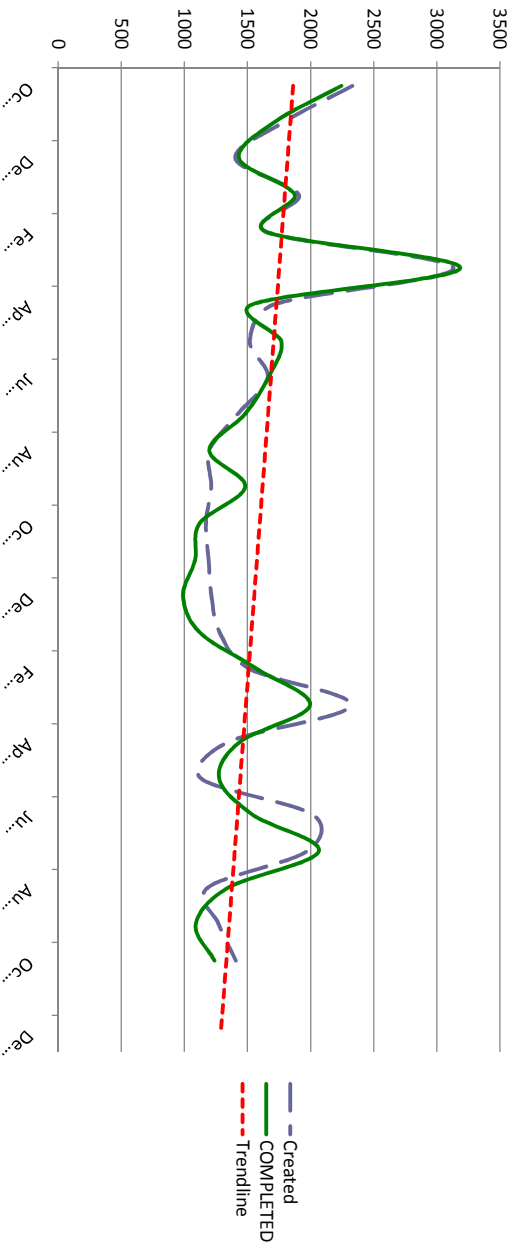
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**TOTAL COMPLETED V. CREATED : ABOVE TARGET = EROSION OF BACKLOG**



6

**NEW CASES CREATED & COMPLETED IN THE PERIOD**



7

**OUTSTANDING CASES**

