

# PENSIONS SECTION ADMINISTRATION

APPENDIX 3A to Budget Monitoring Report at 31st Jan 2011

## Key Performance Indicators

INDICATOR	Green Red Amber	Reporting Dept	2009/10 Actual	Target for 2010/11	Actual - 3 months to 31/01/2011	Comment
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### A Customer Perspective

1a	General Satisfaction with Service - clinic feedback	G	Admin	97%	95%	100%	Only 1 clinics held during period. Excellent feedback received	<b>Graph 1</b>
1b	General Satisfaction with Service - retirees feedback	G	Admin	95%	95%	100%	Good response from retirees. See separate appendix	
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%	n/a	Equalities audit for pensions completed 2005. Equalities Impact Assessments (EIAs) required identified and 2 of the 6 carried out. No further EIAs are required as Council have changed their approach.	
4a	Service Standards - Processing tasks within internal targets (SLA)							
	Deaths [12 days]	G	Admin	89%	90%	88.00%	22 of 25 tasks were completed within target.	
	Retirements [15 days]	G	Admin	70%	90%	86.99%	381 of 438 tasks were completed within target.	
	Leavers (Deferreds) [20 days]	G	Admin	82%	75%	79.96%	718 of 898 tasks were completed within target.	
	Refunds [5 days]	G	Admin	62%	60%	81.25%	39 of 48 tasks were completed within target. 2011 target will be increased to 75%	
	Transfer Ins [20 days]	G	Admin	65%	75%	73.44%	94 of 128 tasks were completed within target.	
	Transfer Outs [15 days]	G	Admin	50%	75%	83.64%	92 of 110 tasks were completed within target.	
	Estimates [10 days]	G	Admin	91%	90%	89.24%	771 of 864 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	36000p/a 3000p/q	14346	4782 per calendar month for reporting period	<b>Graph 2</b>
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	

## 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 in 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) 2.12% 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 2010/11. 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% b) 100%	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%	99.48%	8105 calls, 7996 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%	4.59%	3946 Created, 3765 cleared ( 95.41.% leaving 4.59% 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) 2.5% b) 0.03%	3 out of 106 employers sent their contributions in late. <b>No persistent late-payers. Average delay of late payers 3 days.</b> 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%	All Pen Conts and Pen Rems now received however B&NES were very late in submitting theirs and the first return was inaccurate.	
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%	93.17%	Business Financial Services (inc Pensions) figure is marginally below target
2	Temp Staff levels (% of workforce)	G	All	0.40%	3%	2.56%	Below target.
3	% of IT plan achieved against target	A	Tech & Dev	24%	100% (25% p/q)	20%	EDI progress is slow. The new Pensions Administration Strategy has set out deadlines in 2012 for all employers to provide information electronically.
4	% of Training Plan achieved against target	G	Tech & Dev	100%	100%	100%	Pensions Staff training requirements for all staff identified from 2010 annual performance reviews. An extensive program for 2011 is in place to meet these needs.