

# PENSIONS SECTION ADMINISTRATION

APPENDIX 3A to Budget Monitoring Report at 31 July 2011

## Key Performance Indicators

INDICATOR	Green Red Amber	Reporting Dept	2010/11 Actual	Target for 2011/12	Actual - 3 months to 30/07/2011	Comment
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### A Customer Perspective

1a	General Satisfaction with Service - clinic feedback	G	Admin	97%	95%	100%	11 clinics held during period.	Graph 1
1b	General Satisfaction with Service - retirees feedback	G	Admin	95%	95%	99%	Generally good from response from retirees	
2	Percentage Compliance with Charter Mark criteria	G	Admin	90%	95%	97%	Quality and in particular confidentiality of venue was the least well-scored. Concentrating on this for future See separate appendix	
3	Level of Equalities Standard for Local Government	G	Admin	100%	100%	100%	Chartermark Accreditation obtained as part of B&NES Finance in 2008 - re-assessment is due in 2011	
4a	Service Standards - Processing tasks within internal targets (SLA)							
	Deaths [12 days]	G	Admin	76%	90%	to follow*	* see narrative in report	
	Retirements [15 days]	G	Admin	82%	90%	to follow*	* see narrative in report	
	Leavers (Deferreds) [20 days]	A	Admin	62%	75%	to follow*	* see narrative in report	
	Refunds [5 days]	G	Admin	85%	75%	to follow*	* see narrative in report	
	Transfer Ins [20 days]	G	Admin	64%	75%	to follow*	* see narrative in report	
	Transfer Outs [15 days]	G	Admin	74%	75%	to follow*	* see narrative in report	
	Estimates [10 days]	G	Admin	94%	90%	to follow*	* see narrative in report	
4b	Service Standards Processing tasks within statutory limits	G	Admin	100%	100%	100%		
5	Number of complaints	G	Admin	2	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	on time	100%	100%	All completed on time	
8	Number of hits per period on APF website	G	Admin	49256	36000p/a 3000p/q	15847	5,282 per calendar month for reporting period	Graph 2
9	Advising members of Reg Changes within 3 months of implementation	G	Admin	100%	100%	n/a	none this quarter	
11	Issue of Newsletter (Active & Pensioners)	G	Admin	100%	100%	N/A	due next quarter	
12	Annual Benefit Statements distributed by year end	G	Admin	70%	100%	N/A	2011 statements due to start being sent next quarter	

### B People Perspective

1	Health & Safety Compliance	G	All	100%	100%	100%	Up to date			
2	% of staff with Investor in People Award (IIP)	G	All	0%	100%	100%	n/a - re- awarded in Summer 2010			
3	% of new staff leaving within 3 months of joining	G	All	0%	4%	0%	No leavers in the period			
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)1.87 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%	Staff training requirements for all staff identified from. 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	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 (See Admin Report)	
2	% Telephone answered within 20 seconds		G	Admin	99%	98%	96.5%	8900 calls, 8585 answered within 20 seconds -marginally behind target	Graph 4
3	% Complaints dealt with within Corporate Standards		G	Admin	100%	100%	n/a	No complaints in the period	
4	Letters answered within corporate standard		G	Admin	95%	95%	100%	Ahead of target	
5	Maintain work in progress/outstanding at <b>below 10%</b>		G	Admin	5.77%	10%	4.22%	In the 3 month period 3744 Created, 3589 cleared ( 95.78.% leaving 4.22% of workload outstanding) Within target	Graphs 5 6 & 7)
6	Collection of Pension Contributions:- a) % Received late b) Late contributions as a % of total		G	Accounts	a) 6% b) 0.05%	a) 0% b) 0%	a) 1.8% b) 0.08%	An average of 2 of the 112 employers sent their contributions in late. <b>No persistent late-payers.</b> Average delay of late payers was 9 days however the amounts involved were negligible at under 1% of the total of 10.9m. 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 31/08/2011)		G	Admin	81%	100%	98%	All Pen Conts and Pen Rems now received however, North Somersets Pen Rems returned as 1500 post numbers missing.	
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%	93.72%	Business Financial Services (inc Pensions) figure is marginally below target	
2	Temp Staff levels (% of workforce)		G	All	0.40%	3%	2.66%*	* For the purposes of reoprtng temporary staff levels these only show <b>agency</b> temporary staff. Previous reports have included B&NES staff who are on temporary contracts. There are currently 2 FTE staff in te benefits area who are kept on temporary contracts intentionally so that they there is the flexibility to move them around to cover for maternity absence.	
3	% of IT plan achieved against target		R	Supp & Dev	24%	100% (25% p/q)	20%	EDI progress has been slow. The new 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.	
4	% 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.	