

Strategic Objectives Scorecard - Current position and progress of individual measures

Current
Frequency*

Administration Summary		
Administration Strategy		
1a. Service standards achieved in 95% of cases (100% for legal requirements)		Q
1b. Customer Satisfaction Surveys with scheme employers and scheme members achieving 90% of scores in positive responses in these areas		A
1c. Positive scheme employer feedback with minimal or no employer complaints		A
1d. Positive scheme member feedback with minimal or no member complaints		A
2a. Use of Employer Self Service (ESS) as a default, (100% of employers using the data portal), unless valid reasons not to do so (and have been agreed by the Fund)		Q
2b. Positive scheme employer feedback with minimal or no employer complaints		A
2c. No breaches of data security protocols		Q
3a. Positive results in internal and external audits and other means of oversight/scrutiny		A
3b. Performance target achieved for collection of contributions by 19th day of the month following the deduction		Q
3c. Minimal issues against the Fund identified by Internal Dispute Resolution Procedures and complaints		A
4a. Customer Satisfaction Surveys with scheme employers achieving 90% of scores in positive responses in these areas		A
4b. Issues included in formal improvement notices issued to scheme employers resolved in accordance with plan		A
4c. Notify scheme employers of changes to the scheme rules within 2 months of change		Q
4d. Offer/organise training sessions for new scheme employers and relevant new staff within scheme employers within 2 weeks of new employer/staff starting		Q
4e. Organise training for employers where unsatisfactory performance and escalate within 1 month if not attended training or improvements not evident		Q
4f. Employer responsibilities in relation to administration are regularly communicated to employers		A
5a. No breaches of data security protocols		A
5b. Annual data checks (including ongoing reconciliations) resulting in few issues that are all resolved within 2 months		A
5c. Data improvement plan in place with ongoing evidence of delivered agreed improvements.		A
5d. Positive results in audit and other means of oversight/scrutiny		A
6a. Monthly monitoring of Equiniti where Fund asks them to explain variations from agreed Service Level Agreement targets		M
6b. The Fund specifies clear service standards with Equiniti		A
7a. Achieve continual improvement in member engagement with our online tools		A
7b. Monitoring of the performance standards used to inform the service going forward		A
7c. Use feedback from scheme employers on the service to develop plans		A
7d. Fund work with Equiniti on programme of continuous improvement to the service		A
8a. Policy reviewed every 3 years		T
Communications Summary		
Communications Policy Statement		
1. Customer satisfaction surveys with scheme members achieving 90% of scores in positive responses in these areas		A
2. Customer satisfaction surveys with employers and scheme members achieving 90% of scores in positive responses in these areas		A
3. Customer satisfaction surveys with employers and scheme members achieving 90% of scores in positive responses in these areas		A
4. Evidence of consideration given towards available technology solutions		A
5a. Satisfaction survey is undertaken annually and/or on an ongoing basis		A
5b. Results from satisfaction survey are thoroughly analysed and investigated, and trends monitored from previous periods (at least annually)		A
5c. Detailed analysis of survey results is used to identify areas to improve communications in future		A
6. Policy reviewed every 3 years		A

* T - Triennially, B - Biennially, A - Annually, Q - Quarterly, M - Monthly