

Strategic Objectives Scorecard - Current position and progress of individual measures

Administration Summary

Administration Strategy

- 1a. Service standards achieved in 95% of cases (100% for legal requirements)
- 1b. Customer Satisfaction Surveys with scheme employers and scheme members achieving 90% of scores in positive responses in these areas
- 1c. Positive scheme employer feedback with minimal or no employer complaints
- 1d. Positive scheme member feedback with minimal or no member complaints
- 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)
- 2b. Positive scheme employer feedback with minimal or no employer complaints
- 2c. No breaches of data security protocols
- 3a. Positive results in internal and external audits and other means of oversight/scrutiny
- 3b. Performance target achieved for collection of contributions by 19th day of the month following the deduction
- 3c. Minimal issues against the Fund identified by Internal Dispute Resolution Procedures and complaints
- 4a. Customer Satisfaction Surveys with scheme employers achieving 90% of scores in positive responses in these areas
- 4b. Issues included in formal improvement notices issued to scheme employers resolved in accordance with plan
- 4c. Notify scheme employers of changes to the scheme rules within 2 months of change
- 4d. Offer/organise training sessions for new scheme employers and relevant new staff within scheme employers within 2 weeks of new employer/staff starting
- 4e. Organise training for employers where unsatisfactory performance and escalate within 1 month if not attended training or improvements not evident
- 4f. Employer responsibilities in relation to administration are regularly communicated to employers
- 5a. No breaches of data security protocols
- 5b. Annual data checks (including ongoing reconciliations) resulting in few issues that are all resolved within 2 months
- 5c. Data improvement plan in place with ongoing evidence of delivered agreed improvements.
- 5d. Positive results in audit and other means of oversight/scrutiny
- 6a. Monthly monitoring of Equiniti where Fund asks them to explain variations from agreed Service Level Agreement targets
- 6b. The Fund specifies clear service standards with Equiniti
- 7a. Achieve continual improvement in member engagement with our online tools
- 7b. Monitoring of the performance standards used to inform the service going forward
- 7c. Use feedback from scheme employers on the service to develop plans
- 7d. Fund work with Equiniti on programme of continuous improvement to the service
- 8a. Policy reviewed every 3 years

Current	Frequency*	Last Time
Yellow	Q	Red
Grey	A	Grey
Yellow	A	Yellow
Yellow	A	Yellow
Green	Q	Green
Yellow	A	Yellow
Green	Q	Green
Green	A	Green
Yellow	Q	Yellow
Red	A	Red
Grey	A	Grey
Grey	A	Grey
Grey	Q	Grey
Yellow	Q	Yellow
Green	Q	Green
Green	A	Green
Yellow	A	Green
Yellow	A	Yellow
Red	A	Red
Green	A	Green
Yellow	M	Yellow
Green	A	Green
Red	A	Red
Green	A	Green
Green	A	Green
Green	A	Green
Green	T	Green

Communications Summary

Communications Policy Statement

1. Customer satisfaction surveys with scheme members achieving 90% of scores in positive responses in these areas
2. Customer satisfaction surveys with employers and scheme members achieving 90% of scores in positive responses in these areas
3. Customer satisfaction surveys with employers and scheme members achieving 90% of scores in positive responses in these areas
4. Evidence of consideration given towards available technology solutions
- 5a. Satisfaction survey is undertaken annually and/or on an ongoing basis
- 5b. Results from satisfaction survey are thoroughly analysed and investigated, and trends monitored from previous periods (at least annually)
- 5c. Detailed analysis of survey results is used to identify areas to improve communications in future
6. Policy reviewed every 3 years

Grey	A	Grey
Grey	A	Grey
Grey	A	Grey
Grey	A	Grey
Grey	A	Grey
Red	A	Red
Grey	A	Grey
Grey	A	Grey
Green	T	Green

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