

Pension Board Supplementary Agenda



8. **Croydon Pensions Administration Team Key Performance Indicators** (Pages 3 - 14)

This report sets out Key Performance Indicators for the administration of the Local Government Pension Scheme (LGPS) for the three month period up to the end of November 2021.

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Croydon Pensions Admin Team Performance Report

November 2021

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Reference Key Table

Direction of travel reference table	
	100% achieved against target performance improved
	100% achieved on target and performance static
	>90% achieved against target and performance improved
	>90% achieved against target and performance static
	>90% achieved against target and performance declined
	<90% achieved against target and performance improved
	<90% achieved against target and performance static
	<90% achieved against target and performance declined

Legal Deadlines

Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		September 2021		October 2021		November 2021			
Send a notification of joining the LGPS to a scheme member	Two months from the date of joining the scheme or earlier if within one month of receiving jobholder information where the individual is being automatically enrolled/re-enrolled	69	90%	189	98%	191	99%		<p>We have a pension support officer who is working solely on processing new starters to ensure we keep on top of ongoing demand.</p> <p>Performance in this area has significantly improved during this financial year. At the end of April only 48% new starters were processed within the legal deadline compared with 99% at end November.</p> <p>There were only 2 historic cases in November that were not processed within legal deadlines, all new starter cases were processed within the deadline.</p> <p>The total amount of new starters outstanding has also decreased from 530 at end April to 53 at end November.</p>
Inform a scheme member of their calculated benefits (refund or deferred)	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	53	53%	92	30%	97	47.42%		<p>Historical backlog has now been passed to Hymans Robertson for processing. As old cases are processed this will impact on performance against target. Until the backlog is cleared 100% performance against this deadline will not be met.</p>






Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		September 2021		October 2021		November 2021			
To process and pay a refund	Two months from the date of request	12	100%	7	100%	14	100%		
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	5	100%	1	100%	3	100%		
Notify the amount of retirement benefits	One month from the date of retirement if on or after normal pension age or two months from the date of retirement if after normal pension age	71	100%	37	100%	54	100%		
Provide a retirement quotation on request	As soon as practicable but no more than two months from the date of request unless there has already been a request in the last 12 months	58	100%	58	100%	55	100%		

Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		September 2021		October 2021		November 2021			
Calculate and notify (dependent(s) of amount of death benefits	As soon as possible but in any event no more than two months from date of becoming aware of death or from date of request from a third party (e.g. personal representative)	16	100%	29	100%	21	95.24%	↓	There were 2 cases not processed within the legal deadline in November, one of which was a particularly complex case which took a significant amount of time to resolve.
Provide all active and deferred members with annual benefit statements each year	By 31 st August			17187	99.94%				This is an improvement on previous year performance when only 97.84% annual benefit statements were issued by the deadline of 31 August

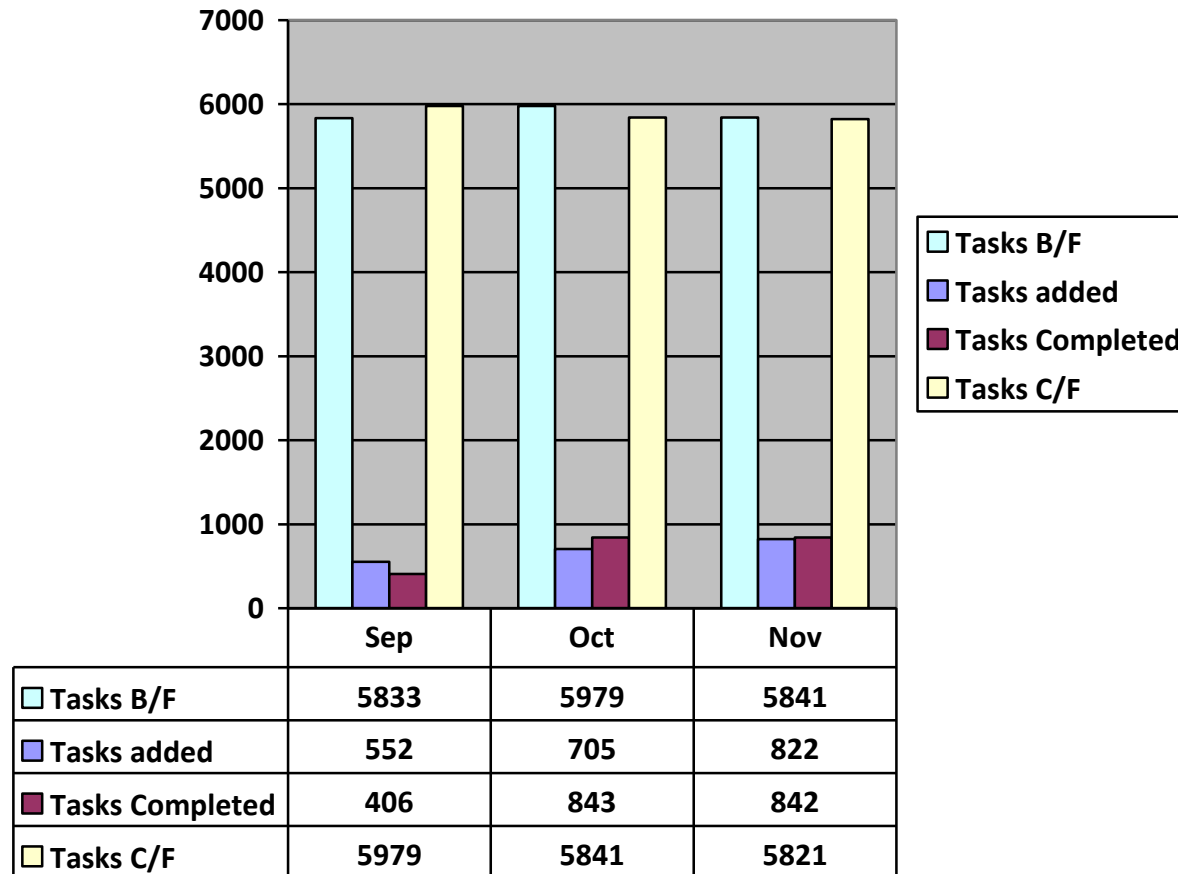
Team Performance Targets

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Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		September 2021			October 2021			November 2021				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	69	87%	21	189	98%	12	191	99%	4	↑	<p>We have a pension support officer who is working solely on processing new starters to ensure we keep on top of ongoing demand.</p> <p>Performance in this area has significantly improved during this financial year. At the end of April only 48% new starters were processed within the legal deadline compared with 99% at end November.</p> <p>The total amount of new starters outstanding has also decreased from 530 at end April to 53 at end September.</p>
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	53	47%	340	92	28%	451	97	42%	457	↑	<p>Historical backlog has now been passed to Hymans Robertson for processing. As old cases are processed this will impact on performance against target. Until the backlog is cleared 100% performance against target will not be met.</p>

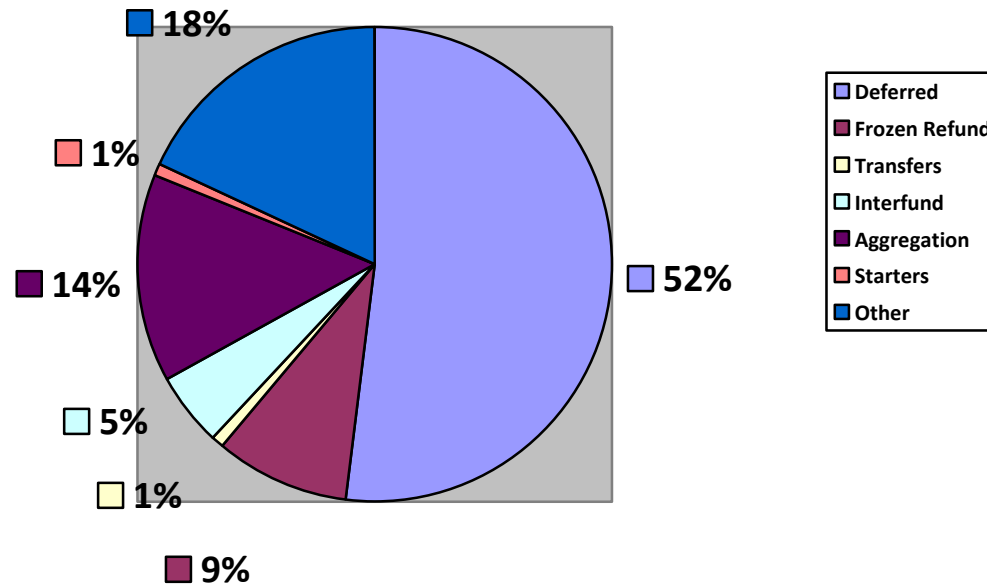
Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		September 2021			October 2021			November 2021				
To process and pay a refund	40 working days from the date of request	12	100%	9	7	100%	4	14	100%	5		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	5	100%	5	1	100%	1	3	100%	1		
Notify the amount of retirement benefits	20 working days from date of retirement	71	100%	3	37	100%	2	54	100%	2		
Provide a retirement quotation on request	15 working days from date of request	58	97%	6	58	97%	3	55	91%	4		In November there were 5 estimates not processed within team target. However 100% were processed within the legal deadline, with the longest wait time being 27 days.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	29	100%	6	22	100%	8	21	91%	44		There were 2 cases not processed within the legal deadline in November, one of which was a particularly complex case which took a significant amount of time to resolve.

Case levels



40% outstanding tasks relate to historic backlog of deferred benefit cases

Outstanding Cases by Type



Member self-service

Scheme members registered	5222 (29%)
Number scheme members who accessed annual benefit statement Q2 Jun 2021 – Sep 2021	1065

Contributions Monitoring Report

Contributions reconciled to schedules	% completed
January to March 2021	100
April to June 2021	100
July to September 2021	98.53

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