









Croydon Pensions Admin Team Performance Report

June 2022



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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
		March 2022		April 2022		May 2022			
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	116	97%	424	97%	138	97%		New starter cases increase at this time of year as a result of the end of year processes. New starters that employers have failed to inform us of through out the year are identified.
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)	191	20%	260	15%	118	34%		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.






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
		March 2022		April 2022		May 2022			
To process and pay a refund	Two months from the date of request	8	100%	8	100%	16	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	2	100%	2	100%	0	N/A	➡	
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	30	100%	48	100%	52	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%	66	98%	80	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
		March 2022		April 2022		May 2022			
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)	13	100%	24	100%	34	100%		
Provide all active and deferred members with annual benefit statements each year	By 31 st August								

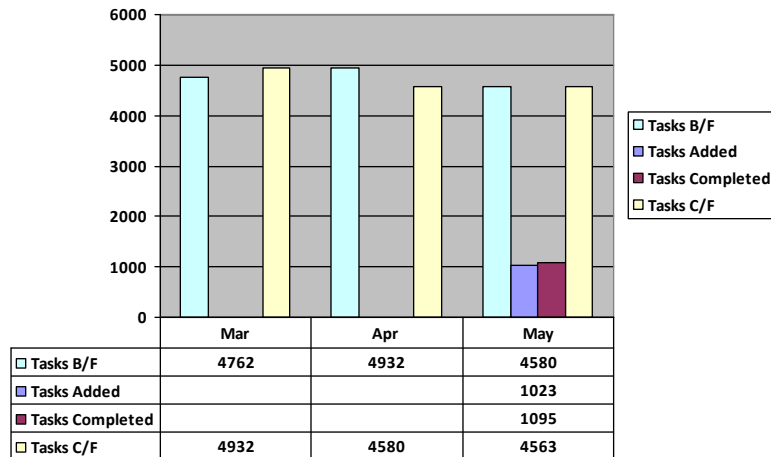
Team Performance Targets

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
		March 2022			April 2022			May 2022				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	116	60%	26	424	53%	30	138	66%	22	↑	New starters that employers have not informed us about are being identified as part of the end of year process. 47 cases did not meet target. Average days to process has failed to well with KPI targets. Extra resources within the admin team are being used to clear new starter cases
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	191	17%	873	260	11%	802	118	29%	591	↑	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. The Pension Committee have requested a breakdown between backlog and current cases. However the May KPI report had already been run and it is not possible to show

the changes here. We are investigating the changes needed for the report and aim to have this ready for June 2022 reporting.

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
		March 2022			April 2022			May 2022				
To process and pay a refund	40 working days from the date of request	8	100%	26	8	100%	4	16	100%	2		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	2	100%	1	2	50%	18	0	NA	NA		No transfer cases were done in May 2022
Notify the amount of retirement benefits	20 working days from date of retirement	30	100%	3	48	100%	3	52	100%	1		
Provide a retirement quotation on request	15 working days from date of request	58	97%	5	66	95%	6	80	99%	4		Two cased in March, three cases in April and one case in May missed target.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	13	100%	6	-	-	-	34	100%	4		The report for April produced an inaccurate figure of 79.17% which fell well below our usual performance for this

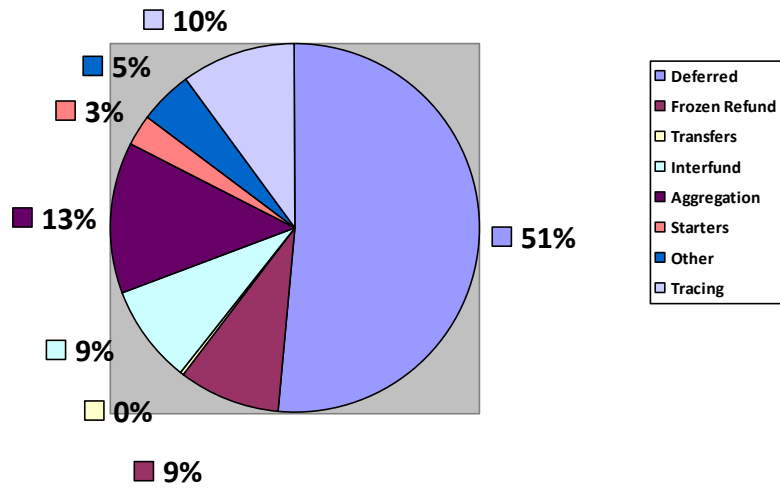
Case levels – excluding backlog cases



More tasks are being created automatically as part of the i-Connect system. These tasks are not included in the standard outstanding case reports. We are therefore now using two separate reports to capture both tasks and cases so to accurately reflect the workload situation. The number of added and completed tasks for March and April 2022 have been excluded from the above table as the data is only partially completed.

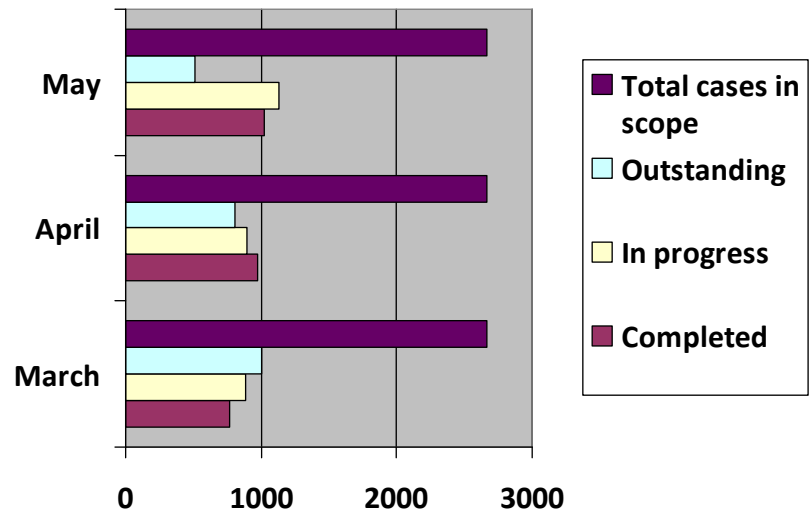
The above table does not include cases being completed as part of the backlog project. These have been separated out and reported on a separate table below.

Outstanding Cases by Type



Additional case types have been added to provide further details. Tracings case are those where the calculations have been completed and checked but we need to use a tracing service to confirm the individuals current address. The bulk of these relate to completed backlog cases.

Backlog cases levels



Contributions Monitoring Report	
Contributions reconciled to schedules	% completed
Oct 21 to Mar 22	98.55