









Croydon Pensions Admin Team Performance Report

June 2023



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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 |
|---|---|------------------------|------------------------------|------------------------|------------------------------|------------------------|------------------------------|---|---|
| | | February 2023 | | March 2023 | | April 2023 | | | |
| 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 | 147 | 100% | 222 | 100% | 86 | 97.67% |  | 2 cases missed target in April 2023 |
| 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) | 58 | 67.24% | 50 | 78% | 45 | 75.56% |  | <p>19 cases missed target in February 2023. 11 cases missed target in March 2023. 11 cases missed target in April 2023.</p> <p>Many deferred benefit calculations are delayed due to outstanding interfund and aggregation cases. The team have been focusing on Blitz Days and a change in aggregation process to try and eliviate this issue. Interfund transfers have been put on hold whild we await new factrs from GAD.</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 |
|---|---|------------------------|------------------------------|------------------------|------------------------------|------------------------|------------------------------|---------------------|--|
| | | February 2022 | | March 2023 | | April 2023 | | | |
| To process and pay a refund | Two months from the date of request | 9 | 100% | 18 | 100% | 10 | 100% | ➡ | |
| Obtain transfer details for transfer in, calculate and provide quotation to member | Two months from the date of request | 3 | 100% | 4 | 100% | 1 | 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 | 52 | 100% | 53 | 100% | 45 | 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 | 74 | 98.65% | 84 | 100% | 73 | 100% | ⬇ | 2 cases missed target in February 2023. One case was delayed while the deferred benefit was calculated. The other case was a completed case that was incorrectly reopened and task comments added. Training has been provided to the team to prevent this in the future. |

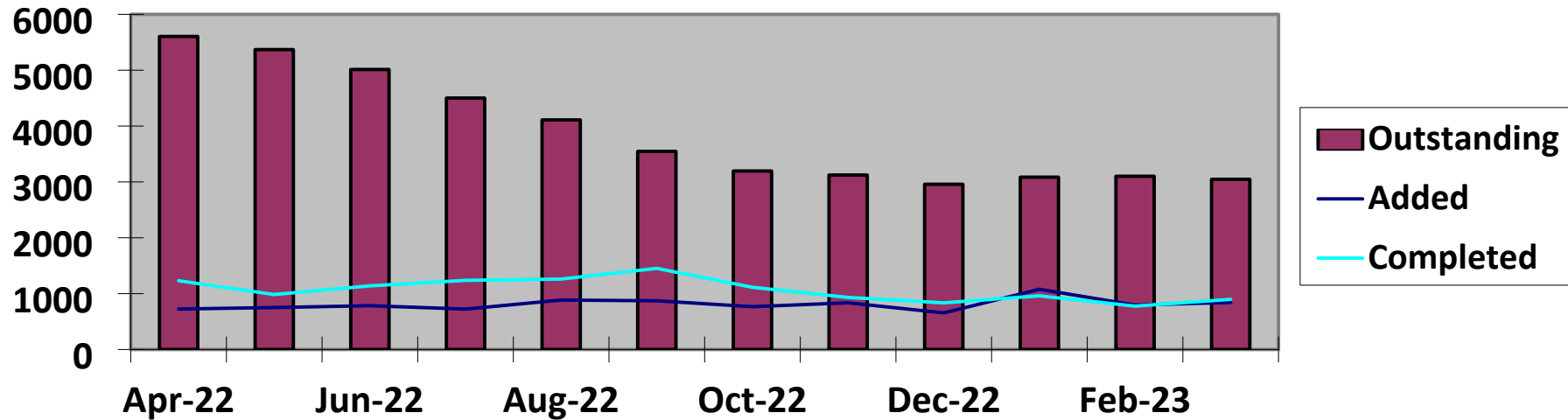
| Process | Legal Requirement | Total Number Completed | % Achieved in legal deadline | Total Number Completed | % Achieved in legal deadline | Total Number Completed | % Achieved in legal deadline | Direction of Travel | Comments |
|---|---|------------------------|------------------------------|------------------------|------------------------------|------------------------|------------------------------|---------------------|----------|
| | | February 2023 | | March 2023 | | April 2023 | | | |
| 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) | 23 | 100% | 36 | 100% | 22 | 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 |
|---|--|------------------------|---------------------------|-------------------------|------------------------|---------------------------|-------------------------|------------------------|---------------------------|-------------------------|---|---------------------------------|
| | | February 2023 | | | March 2023 | | | April 2023 | | | | |
| Send a notification of joining the LGPS to a scheme member | 30 days from date of notification of joining member | 147 | 100% | 1 | 222 | 100 | 2 | 86 | 97.67% | 12 |  | 2 cases missed target in April. |
| Inform a scheme member of their calculated benefits (refund or deferred) | 40 working days from date of notification (from employer or scheme member) | 58 | 67.24% | 249 | 50 | 78% | 96 | 45 | 75.56% | 249 |  | |

| 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 |
|---|---|------------------------|---------------------------|-------------------------|------------------------|---------------------------|-------------------------|------------------------|---------------------------|-------------------------|---|---|
| | | February 2023 | | | March 2023 | | | April 2023 | | | | |
| To process and pay a refund | 40 working days from the date of request | 9 | 100% | 1 | 18 | 100% | 1 | 10 | 100% | 3 |  | |
| Obtain transfer details for transfer in, calculate and provide quotation to member | 40 working days from the date of request | 3 | 100% | 1 | 4 | 100% | 1 | 1 | 100% | 2 |  | |
| Notify the amount of retirement benefits | 20 working days from date of retirement | 52 | 100% | 3 | 53 | 100% | 2 | 45 | 100% | 2 |  | |
| Provide a retirement quotation on request | 15 working days from date of request | 74 | 97.30% | 19 | 84 | 100% | 3 | 73 | 98.63% | 3 |  | Two cases missed target in February 2023. One case was delayed while the deferred benefit was calculated. The other case was a completed case that was incorrectly reopened and task comments added. Training has been provided to the team to prevent this in the future. One case missed target in April. |
| Calculate and notify (dependent(s) of amount of death benefits | 20 working days from receipt of all information | 23 | 100% | 2 | 36 | 100% | 2 | 22 | 100% | 2 |  | |

Case levels



Number of outstanding cases

The Backlog Project tracing tasks have been removed as they do not represent work to be completed.

Member self-service

| | |
|---|---------------|
| Total Scheme members registered | 5849 (22.74%) |
| Number scheme members who accessed annual benefit statement in Q1 2022/23 | 498 |
| Breakdown by member status | |
| • Actives | 29.69% |
| • Deferred | 19.80% |
| • Pensioners & Dependents | 17.03% |

