









Croydon Pensions Admin Team Performance Report

July 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
		March 2023		April 2023		May 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	222	100%	86	97.67%	86	100%		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)	50	78%	45	75.56%	64	85.94%		11 cases missed target in March 2023. 11 cases missed target in April 2023. 10 cases missed target in May 2023. 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. Some Interfund transfers were put on hold during this period while we awaited new factors from GAD.

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 2023		May 2023			
To process and pay a refund	Two months from the date of request	18	100%	10	100%	13	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	4	100%	1	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	53	100%	45	100%	57	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	84	100%	73	100%	77	98.70%	⬇	2 cases missed target in May 2023. On investigation this was due to the reply Due dates within the task management system not being properly applied while we were tracing the members. The team have been reminded about correct workflow process.

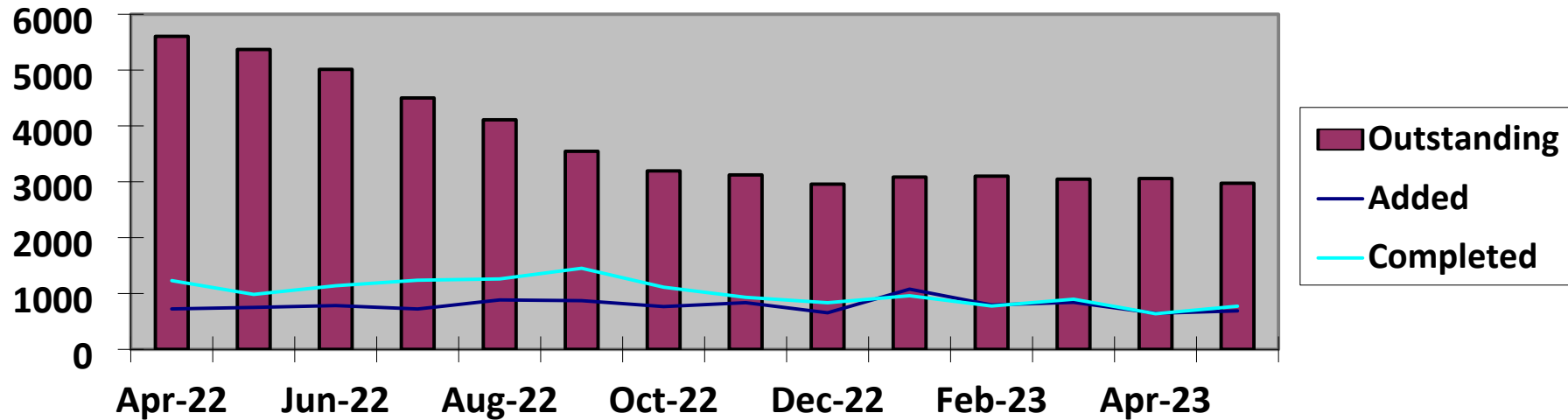
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		March 2023		April 2023		May 2023			
Calculate and notify (dependent(s) of amount of death 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)	36	100%	22	100%	28	96.43%	↓	One case missed target in May 2023. On investigation this was due to the reply due date not being correctly updated. Task comments show case was processed in a timely way. Have reminded team of workflow process but no concerns.
Provide all active and deferred members with annual benefit statements each year	By 31 st August	N/A	N/A	N/A	N/A	N/A	N/A	N/A	

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 2023			April 2023			May 2023				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	222	99.55%	2	86	97.67%	12	86	98.84	1		2 cases missed target in April and 1 case missed target in May 2023.
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	50	74%	96	45	68.89%	249	64	84.38%	76		Improvement in % meeting target and we will work to continue this trend.

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 2023			April 2023			May 2023				
To process and pay a refund	40 working days from the date of request	18	100%	1	10	100%	3	13	100%	2		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	4	100%	1	1	100%	2	1	100%	0		
Notify the amount of retirement benefits	20 working days from date of retirement	53	100%	2	45	100%	2	57	100%	2		
Provide a retirement quotation on request	15 working days from date of request	84	100%	3	73	98.63%	3	77	97.40%	7		One case missed target in April. Two cases missed target in May 2023. On investigation this was due to the reply Due dates within the task management system not being properly applied while we were tracing the members. The team have been reminded about correct workflow process.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	36	100%	2	22	100%	2	28	96.43%	7		One case missed target in May 2023. On investigation this was due to the reply due date not being correctly updated. Task comments show case was processed in a timely way. Have reminded team of

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%

Contributions Monitoring

Contributions reconciled to schedules	% Completed
January to March 2023	98.28%