

Croydon Pensions Admin Team Performance Report

October 2023









Delivering for Croydon

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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
		June 2023		July 2023		August 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	74	97.30%	107	99.07%	90	98.89%		2 cases missed target in June 1 case missed target in July 1 case missed target in August (delay in getting information from the employer).
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)	65	73.85%	105	60%	128	72.66%		Cases processed by the Bulk Calculation facility have not been included. 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
		June 2023		July 2023		August 2023			
To process and pay a refund	Two months from the date of request	13	100%	14	100%	18	100%		
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	0	N/A	2	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	57	100%	51	100%	33	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	68	100%	70	100%	69	98.55%		1 case missed target in August. This was due to the workflow task being set up incorrectly. The task comments show the case was processed and checked within target.

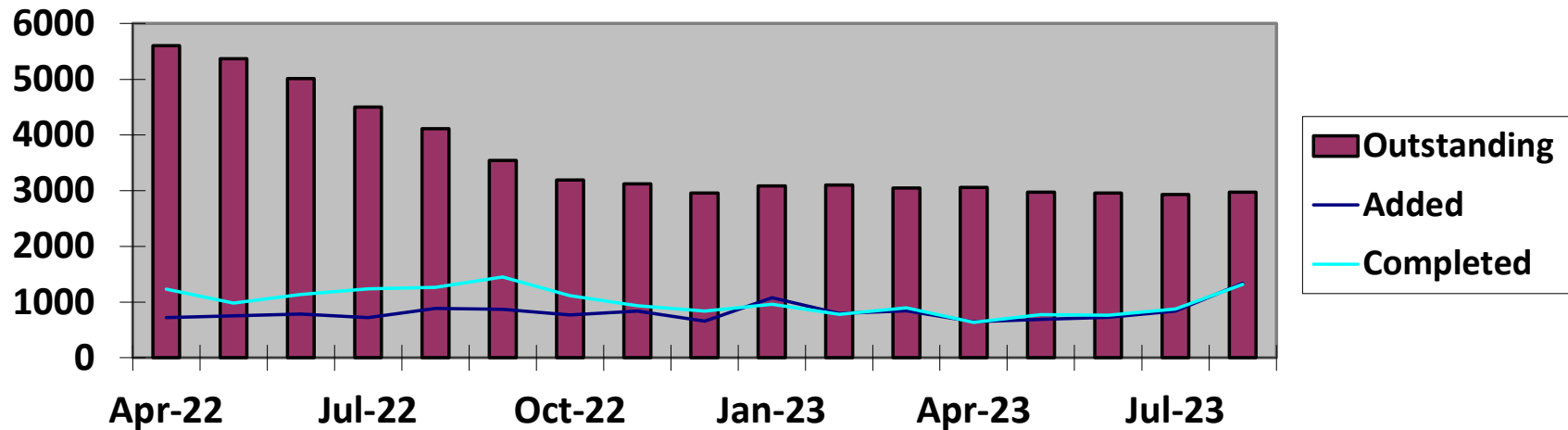
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		June 2023		July 2023		August 2023			
Calculate and notify (dependent(s) of amount of death 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)	30	100%	28	100%	21	100%		
Provide all active and deferred members with annual benefit statements each year	By 31 st August					Actives Deferred Combined Total	100% 90.33% 94.61%		Maintained 100% of ABSs for active members. We have seen an improvement in the Deferred ABSs from previous year (86.19%).

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
		June 2023			July 2023			August 2023				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	74	97.30%	5	107	99.07%	2	90	98.89%	3		1 case missed target in August (delay in getting information from the employer)
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	65	73.85%	79	105	60%	214	128	71.09%	166		Bulk leaver calculations have not been included. Work continues via Blitz Days and targeted work allocation to improve leaver calculations.

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
		June 2023			July 2023			August 2023				
To process and pay a refund	40 working days from the date of request	13	100%	2	14	100%	1	18	100%	1		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	0	N/A	N/A	2	100%	0	1	0.00%	13		One case in August was delayed while we waited for new GAD factors.
Notify the amount of retirement benefits	20 working days from date of retirement	57	100%	2	51	100%	1	33	100%	1		
Provide a retirement quotation on request	15 working days from date of request	68	98.53%	3	70	100%	2	69	97.10%	6		1 case missed target in June. We were unable to trace te member and the reply due was not updated correctly. 2 case missed target in August. One was due to the workflow task being set up incorrectly. The task comments show the case was processed and checked within target. The second case missed target by one day.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	30	96.67%	4	28	92.86%	9	21	95.24%	3		1 case missed target in June 2 cases missed target in July 1 case missed target in August

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

		Increase from previous Q
Total Scheme members registered	6222 (23.39%)	↑
Number scheme members who accessed annual benefit statement in Q1 2023/24	591	↑
Breakdown by member status		
• Actives	30.89%	↑
• Deferred	20.45%	↑
• Pensioners & Dependents	19.42%	↑

