Croydon Pensions Admin Team
Performance Report

January 2024

Contents

Reference Key Table

Direction of travel reference table	
⬆ (green)	100% achieved against target performance improved
➡ (green)	100% achieved on target and performance static
⬆ (amber)	>90% achieved against target and performance improved
➡ (amber)	>90% achieved against target and performance static
⬇ (amber)	>90% achieved against target and performance declined
⬆ (red)	<90% achieved against target and performance improved
➡ (red)	<90% achieved against target and performance static
⬇ (red)	<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 2023		October 2023		November 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	212	100%	316	100%	193	100%	➡	
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)	34	73.53%	71	60.56%	136	76.47%	⬆	Processing leaver calculations within legal and fund level timeframes remains a challenge for the team. Leaver calculations are particularly vunerable to delays caused by interfund transfers, aggregations and TUPE transfers. Spikes in other workload areas do draw resource away from leaver calculations. We recognise the issue and leavers are forming a key part of our work plan for 2024. Leavers account for approx 50% of our workload and we need to ensure this is resources accordingly.

									A review of work allocation and resouces has been planned for early January.

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 2023		October 2023		November 2023			
To process and pay a refund	Two months from the date of request	13	100%	18	100%	10	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	2	100%	2	100%	2	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	98.59%	71	100%	45	100%	⬆	Once case missed target in September 2023.
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	66%	100%	86	100%	77	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 2023		October 2023		November 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)	20	100%	34	100%	42	97.62%	➡	One case missed target in November 2023. Protracted arrangements to pay the death grant – complex case.
Provide all active and deferred members with annual benefit statements each year	By 31st August								

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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
		September 2023			October 2023			November 2023				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	212	100%	6	316	100%	4	193	98.45%	2	🔽	3 cases missed target in November.
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	34	73.53%	84	71	57.75%	142	136	72.79%	66	➡️	

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 2023			October 2023			November 2023				
To process and pay a refund	40 working days from the date of request	13	100%	5	18	100%	1	10	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	100%	0	2	100%	3	➡️	
Notify the amount of retirement benefits	20 working days from date of retirement	71	98.59%	9	71	100%	2	45	100%	1	➡️	One case missed target in September 2023.
Provide a retirement quotation on request	15 working days from date of request	66	100%	4	86	96.51%	3	77	100%	3	➡️	3 cases missed target in October. These were all complex cases and required additional trainning.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	20	100%	2	34	94.12%	7	42	95.24%	7	➡️	2 cases missed target in October but upon investigation one of these was as a result of the task being reopned by a junior member of the team when a document was retunred. The case had originally been completed within the KPI. Training has been provided. In November 2 cases missed target.

Case levels
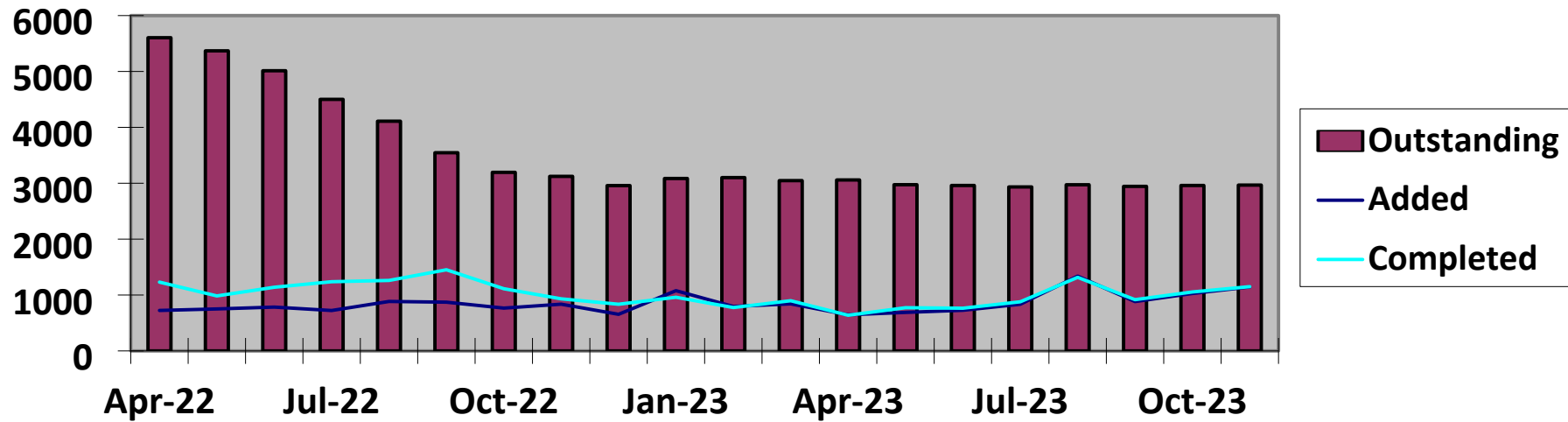
Number of outstanding cases
The Backlog Project tracing tasks have been removed as they do not represent work to be completed.

Member self-service

		Increase from previous Q
Total Scheme members registered	6497 (24.42%)	↑
Number scheme members who accessed annual benefit statement in Q2 2023/24	1095	↑
Breakdown by member status		
• Actives	31.84%	↑
• Deferred	21.78%	↑
• Pensioners & Dependents	20.21%	↑