









Croydon Pensions Admin Team Performance Report

March 2024



Contents

- Reference Key Table.....3
- Legal Deadlines.....4
- Team Performance Targets6
- Case levels.....9
- Member self-service9

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
		November 2023		December 2023		January 2024			
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	193	100%	209	100%	185	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)	136	76.47%	65	73.85%	86	80.23%		We have seen a slight improvement in this area primarily due to dedicated Blitz Days to calculate leaver benefits.

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
		November 2023		December 2023		January 2024			
To process and pay a refund	Two months from the date of request	10	100%	10	100%	11	90.91%	↓	One case missed target in January – several issues obtaining information from the employer.
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	2	100%	6	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	45	100%	52	100%	56	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	77	100%	52	100%	78	100%	→	

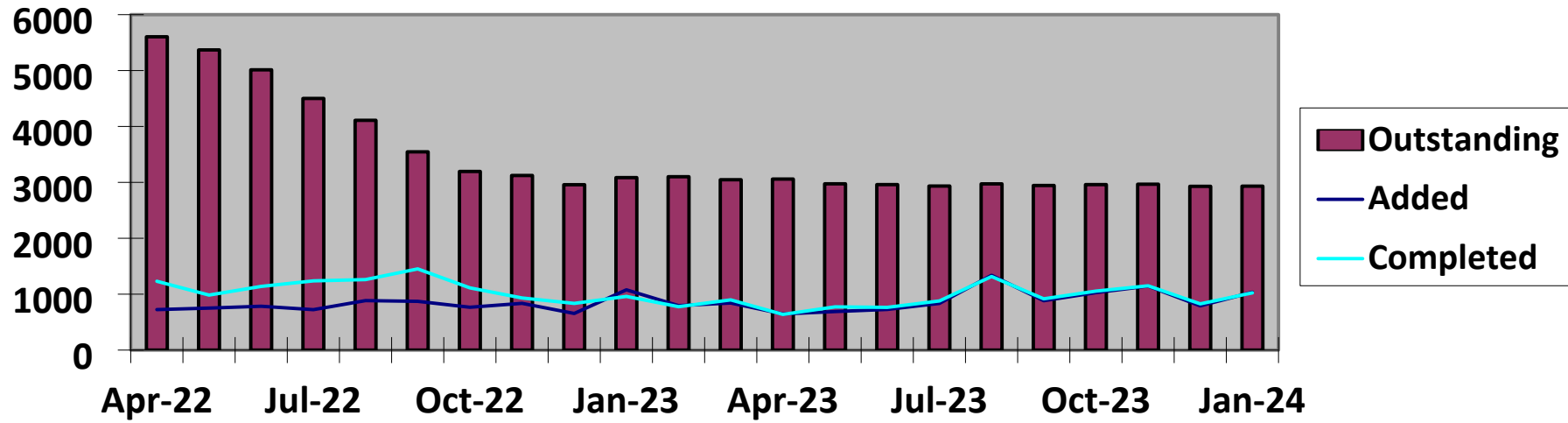
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		November 2023		December 2023		January 2023			
Calculate and notify (dependent(s) of amount 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)	42	97.62%	22	100%	32	100%	↑	One case missed target in November 2023. This was a complex case due to difficulties with the death grant.
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
		November 2023			December 2023			January 2024				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	193	98.45%	2	209	98.56%	2	185	100%	1		
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	136	72.79%	66	65	69.23%	137	86	75.58%	47		<p>Leaver calculations continue to be below legal and Croydon KPIs.</p> <p>Currently leaver calculations are resourced through BAU work and dedicated Blitz Days. A review is being carried out to devise new ways of resourcing leaver calculations.</p>

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
		November 2023			December 2023			January 2024				
To process and pay a refund	40 working days from the date of request	10	100%	2	10	100%	1	11	90.91%	43		One task missed target and this is because the wrong case type was set up.
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	2	100%	3	6	83.33%	9	0	N/A	N/A		One case missed target in December 2023.
Notify the amount of retirement benefits	20 working days from date of retirement	45	100%	1	52	100%	1	56	100%	2		
Provide a retirement quotation on request	15 working days from date of request	77	100%	3	52	100%	2	78	93.59%	4		5 cases missed target in January 2024. Higher than usual – review shows the main issue s reply dues not set correctly on the workflow system. Team issued with the guidance again.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	42	95.24%	7	22	100%	2	32	96.88%	5		Two cases missed target in November 2023 and one case missed target in January 2024.

Case levels



Member self-service

		Increase from previous Q
Total Scheme members registered	6608 (24.84%)	↑
Number scheme members who accessed annual benefit statement in Q3 2023/24	556	↓
Breakdown by member status		
• Actives	32.16%	↑
• Deferred	21.90%	↑
• Pensioners & Dependents	21.05%	↑