

LONDON BOROUGH OF CROYDON

REPORT:	Pension Committee
DATE OF DECISION	17 September 2024
REPORT TITLE:	Croydon Pensions Administration Team Key Performance Indicators for the Period May 2024 to July 2024
CORPORATE DIRECTOR / DIRECTOR:	Jane West – Corporate Director of Resources (Section 151 Officer)
LEAD OFFICER:	Matthew Hallett – Head of Pensions and Treasury
KEY DECISION?	No
CONTAINS EXEMPT INFORMATION?	NO
WARDS AFFECTED:	‘N/A’

1. SUMMARY OF REPORT

- 1.1 The report sets out the Key Performance Indicators, measured against the legal requirements for the administration of the Local Government Pension Scheme for the three-month period up to the end of July 2024.

2. RECOMMENDATIONS

- 2.1 The Committee is asked to note the Key Performance Indicators and the performance against these indicators set out in Appendix A to this report.

3. REASONS FOR RECOMMENDATIONS

- 3.1 To ensure good governance of the scheme the Committee should be informed of the performance of the administration of the Local Government Pension Scheme and monitor performance against legal deadlines and team performance targets. This report has been developed using guidance published by CIPFA (Administration in the LGPS: A Guide for Pension Authorities).

4. BACKGROUND AND DETAILS

- 4.1** This report covers the period May 2024 to July 2024 and covers legal deadlines, team performance targets, case levels and take up of the member self-service portal. The indicators and performance against these are detailed in Appendix A of this report.
- 4.2** The team have generally met targets for most indicators during this period with only a few cases missing legal and team targets for each category, with the exception of deferred benefit calculations which still fall below expected levels.
- 4.3** Maintaining levels of leaver calculations can be challenging during the summer period when schools are on holiday and obtaining information can take longer.
- 4.4** To assist with the leaver calculations we have been focusing on outstanding interfund transfer cases that were preventing us from running the leaver calculation. For several weeks one member of the team was focused entirely on interfund cases and we saw improvements in lower cases numbers as a result. Interfund cases form part of daily BAU work but we will look to continue targeted periods of intense focus on case types as required.
- 4.5** The majority of the end of year processes were completed within this period with CARE and contributions posted for all but two payroll providers. The number of missing CARE pay queries remains consistent with previous years. Queries will be going out to employers over the summer to clear these issues.
- 4.6** The administration team has attended several member engagement events over the summer. We attended one of our larger schools and gave a presentation to over 100 members on the LGPS and member self-service with one-to-one sessions afterwards. The event was successful and the majority of attendees were able to register for member self-service on the day. We have also been invited to attend team meetings and TUPE consultation meetings within the council to talk about pensions and answer any questions.
- 4.7** We have been working with colleagues in payroll on the Oracle improvement project. This has been a valuable experience, learning how other teams use the system that impacts the data we receive. New processes have been developed as a result of this and we expect to see data quality improvements filtering through.
- 4.8** Members of the team attended several online sessions throughout the summer hosted by our software provider on automation. These sessions were very useful and we have identified a couple of areas we would like to develop once the new Engage member self-service portal has been successfully implemented. These include automated email communications for starters and leavers.

5. ALTERNATIVE OPTIONS CONSIDERED

- 5.1** N/A

6. CONSULTATION

6.1 Officers have previously consulted with both the Pension Committee and Pension Board on the template for the key performance indicators report which forms the basis of Appendix A.

7. IMPLICATIONS

7.1 FINANCIAL IMPLICATIONS

7.1.1. There are no financial considerations arising from this report.

7.1.2. Comments approved by James Huggett, Head of Strategic Finance for Resources, ACE and MTFs on behalf of Allister Bannin, the Director of Finance (Date 06/08/24)

7.2 LEGAL IMPLICATIONS

7.2.1. Burges Salmon LLP (a legal advisor appointed to the Pension Fund) comments there are no direct legal implications arising from the recommendations within this report.

7.2.2. Comments approved by Burges Salmon LLP. (Date 03/09/2024)

7.3 EQUALITIES IMPLICATIONS

7.3.1. Under the Public Sector Equality Duty of the Equality Act 2010, decision makers must evidence consideration of any potential impacts of proposals on groups who share the protected characteristics, before decisions are taken.

7.3.2. Section 149 of the Act requires public bodies to have due regard to the need to:

- eliminate unlawful discrimination
- advance equality of opportunity between people who share a protected characteristic and people who do not share it; and
- foster good relations between people who share a protected characteristic and people who do not share it.

There are no direct negative equality impacts for protected groups identified within this report.

7.3.3. Comments approved by Ken Orlukwu, Senior Equalities Officer, on behalf of Helen Reeves, Head of Strategy & Policy (Date 05/09/2024)

7.4 HUMAN RESOURCES IMPACT

7.4.1. There are no direct workforce impacts arising from this report, but the pension scheme is an important staff benefit for recruitment and retention.

7.4.2. Comments approved by Dean Shoesmith, Chief People Officer. (4/9/2024)

8. APPENDICES

8.1 Appendix A: Croydon Pensions Administration Team Performance Report, May to July 2024

9. BACKGROUND DOCUMENTS

9.1 There are no background documents.