

LONDON BOROUGH OF CROYDON

REPORT:	Pension Committee
DATE OF DECISION	3 December 2024
REPORT TITLE:	Croydon Pensions Administration Team Key Performance Indicators for the Period August 2024 to October 2024
CORPORATE DIRECTOR / DIRECTOR:	Jane West, Corporate Director of Resources (Section 151 Officer)
LEAD OFFICER:	Matthew Hallett – Head of Pensions and Treasury
KEY DECISION? [Insert Ref. Number if a Key Decision]	No
CONTAINS EXEMPT INFORMATION? (* See guidance)	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 October 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 August 2024 to October 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** The end of year processes were completed within this period with CARE and contributions posted for all employers. The number of missing CARE pay queries remains consistent with previous years. Queries will be going out to employers to clear these issues.
- 4.5** 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.
- 4.6** Annual Benefits Statements were issued before the legal deadline for all active members and 92.64% of deferred members which is an increase on previous years.
- 4.7** Member communications were issued to all active members working directly for the Council via the Internal Communication Team. Member communications were issued to all scheme employers to communicate with their staff.
- 4.8** We saw the expected increase in member queries around this time, mostly relating to member self-service registration. Extra staffing resources were made available on the pension inbox to keep up with member queries.
- 4.9** User Acceptance Testing (UAT) was commenced and completed for the new member self-service portal Engage. The Pension Team was provided with training to familiarise them with the new features of the portal and the full registration process.
- 4.10** The new system has since gone live with a soft launch to ensure there were no issues with the live site. So far, we are seeing positive results particularly a reduction in the number of member issues registering for the site.
- 4.11** Member communications will go out later in the year to advertise the site to active members. We are planning further communications to our deferred members. Pensioner members will be notified in the Pension Newsletter issued in the Spring.
- 4.12** The Administration Team participated in joint training with members of the Wandsworth pension team in the areas of Transfers and Aggregations. The training was provided by

the LGA and took place over two separate days hosted by Wandsworth. We were able to share experiences and best practices with Wandsworth. Blitz Days were organised after each training session to imbed the teams understanding of the training.

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 20/11/24)

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 21/11/2024)

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.

The protected characteristics defined by law are race and ethnicity, disability, sex, gender reassignment, age, sexual orientation, pregnancy and maternity, religion or belief, marriage and civil partnership.

7.3.3. There are no equality implications arising from this report.

7.3.4. Comments approved by Ken Orlukwu, Senior Equalities Officer, on behalf of Helen Reeves, Head of Strategy & Policy (Date 21/11/2024).

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, August 2024 to October 2024

9. BACKGROUND DOCUMENTS

9.1 There are no background documents.