Croydon Pensions Admin Team
Performance Report

January 2020

Contents

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 2019		December 2019		January 2020			
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	129	96.9%	219	83.56%	256	82.81%	⬇	A large number of starters were notified to the pension team in December and January which impacted performance
Inform a scheme member of their calculated benefits (refund or deferred) – backlog cases	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	110	28.18%	78	21.79%	64	26.56%	⬆	Historical backlog is impacting performance. Steps are being taken to engage additional resources to address the backlog
Inform a scheme member of their calculated benefits (refund or deferred) – new cases	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	94	100%	65	100%	87	100%	➡	

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
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	42	100%	41	100%	41	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	45	97.78%	37	94.59%	54	100%	⬆	
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)	15	93.33%	18	94.44%	21	100%	⬆	

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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)	15	93.33%	18	94.44%	21	100%	⬆	
Provide all active and deferred members with annual benefit statements each year	By 31st August	16167	> 99%					N/A	All cases that were due to be issued an Annual Benefit statement have been completed

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 2019			December 2019			January 2020				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	129	94.57%	11	219	81.74%	44	254	82.42%	25	⬆️ (red)	A large number of starters were notified to the pension team in December and January which impacted performance
Inform a scheme member of their calculated benefits (refund or deferred) – backlog cases	40 working days from date of notification (from employer or scheme member)	367	27.27%	367	78	20.51%	975	64	23.44%	715	⬆️ (red)	Historical backlog is impacting performance. Steps are being taken to engage additional resources to address the backlog
Inform a scheme member of their calculated benefits (refund or deferred) – new cases	40 working days from date of notification (from employer or scheme member)	30	94	100%	65	100%	7	87	95.40%	20	⬇️ (amber)	Whilst 4 cases were not completed within team target during January, all were completed within the legal deadline
Notify the amount of retirement benefits	20 working days from date of retirement	42	100%	1	41	100%	5	41	100%	2	➡️ (green)	
Provide a retirement quotation on request	15 working days from date of request	45	95.56%	5	37	89.19%	10	54	96.3%	4	⬆️ (amber)	Whilst 2 cases were not completed within team target during January , all were completed within the legal deadline

Team Performance Targets

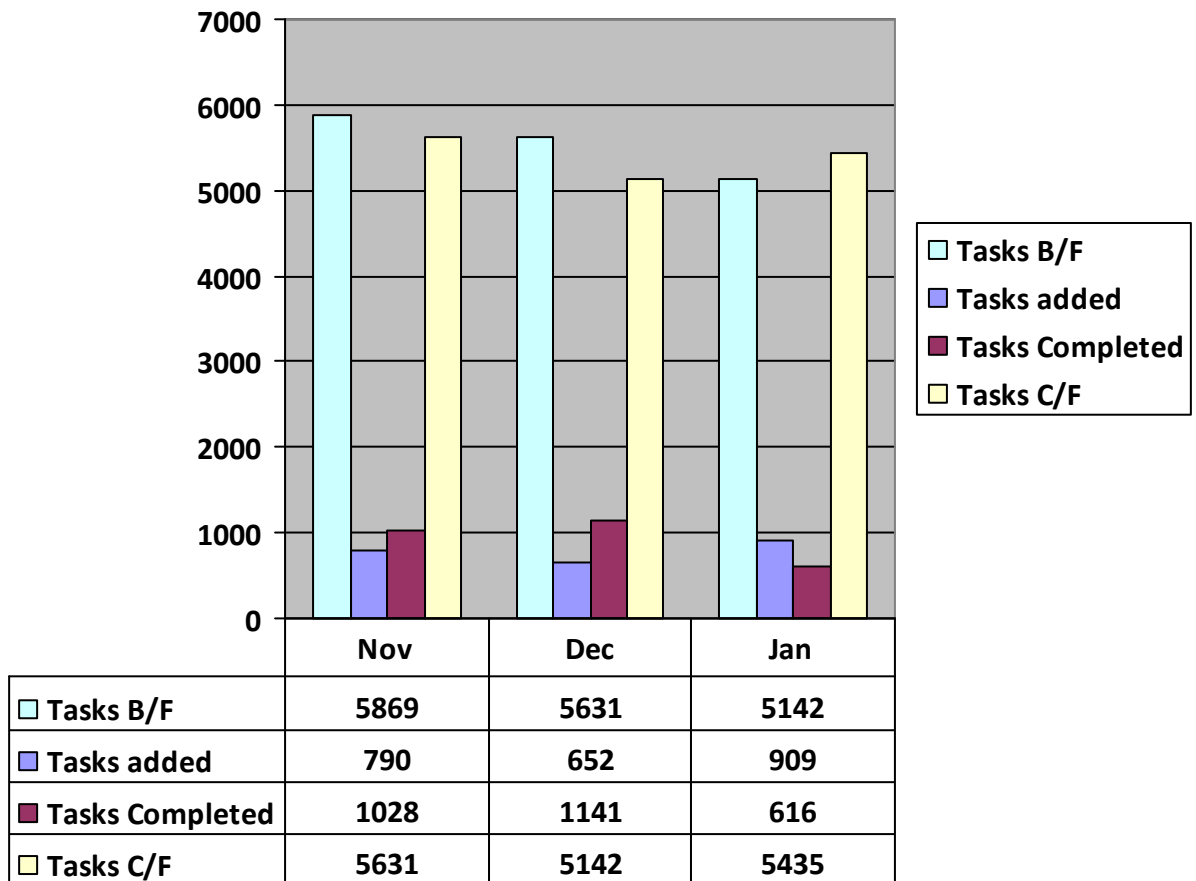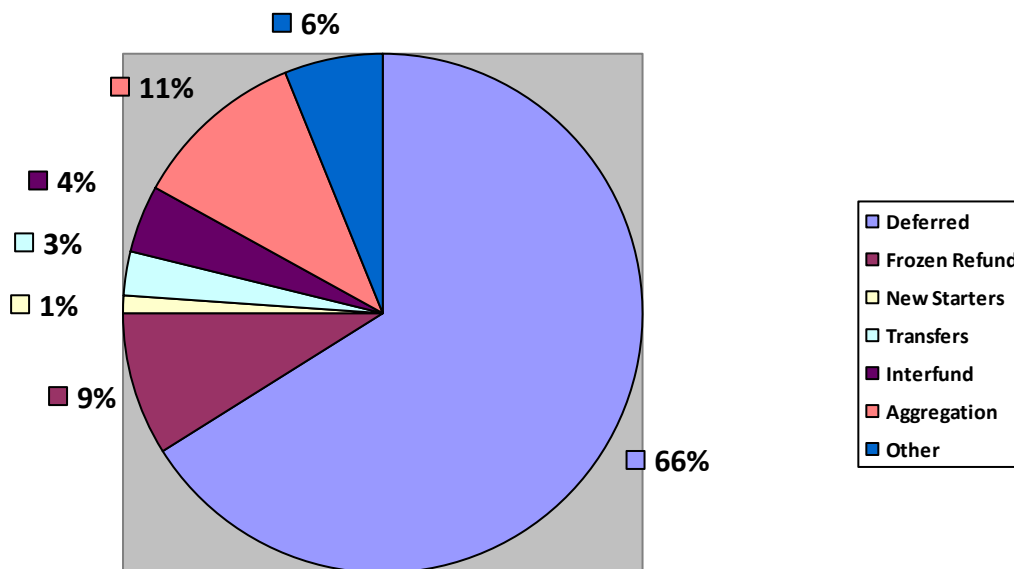| Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	15	100%	3	18	88.89%	16	21	100%	6	⬆	

Direction of travel reference table	
⬆ (green)	100% achieved against target performance improved
➡ (green)	100% achieved on target and performance static
⬆ (yellow)	>90% achieved against target and performance improved
➡ (yellow)	>90% achieved against target and performance static
⬇ (yellow)	>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

Case levels

	Nov	Dec	Jan
☐ Tasks B/F	5869	5631	5142
☐ Tasks added	790	652	909
☐ Tasks Completed	1028	1141	616
☐ Tasks C/F	5631	5142	5435

Legend:
- ☐ Tasks B/F
- ☐ Tasks added
- ☐ Tasks Completed
- ☐ Tasks C/F

Outstanding Cases by Type

6%
11%
4%
3%
1%
9%
66%

Legend:
- ☐ Deferred
- ☐ Frozen Refund
- ☐ New Starters
- ☐ Transfers
- ☐ Interfund
- ☐ Aggregation
- ☐ Other

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Member self-service

Scheme members registered	3879 (24%)
Number scheme members who accessed annual benefit statement Oct 2019 – Jan 2020	1041