

Croydon Pensions Admin Team Performance Report

July 2020

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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
		May 2020		June 2020		July 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	53	98.11%	291	71.13%	28	100%		Large number of new starters were identified as part of year end process which impacted on June performance due to increased volume.
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)	78	20.51%	58	29.31%	81	58.02%		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)	56	76.79%	42	80.95%	48	95.83%		During Q1 2020/21 there was a rise in the number of leavers identified through the end of year reports received from employers which has impacted on performance.

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		May 2020		June 2020		July 2020			
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	3	100%	10	100%	7	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	32	100%	25	100%	27	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	31	93.55%	30	90%	58	98.28%		There has been an increase in demand in July due to the staffing reduction consultation

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		May 2020		June 2020		July 2020			
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)	34	97.06%	25	100%	24	100%		
Provide all active and deferred members with annual benefit statements each year	By 31 st August	n/a	n/a	n/a	n/a	n/a	n/a		

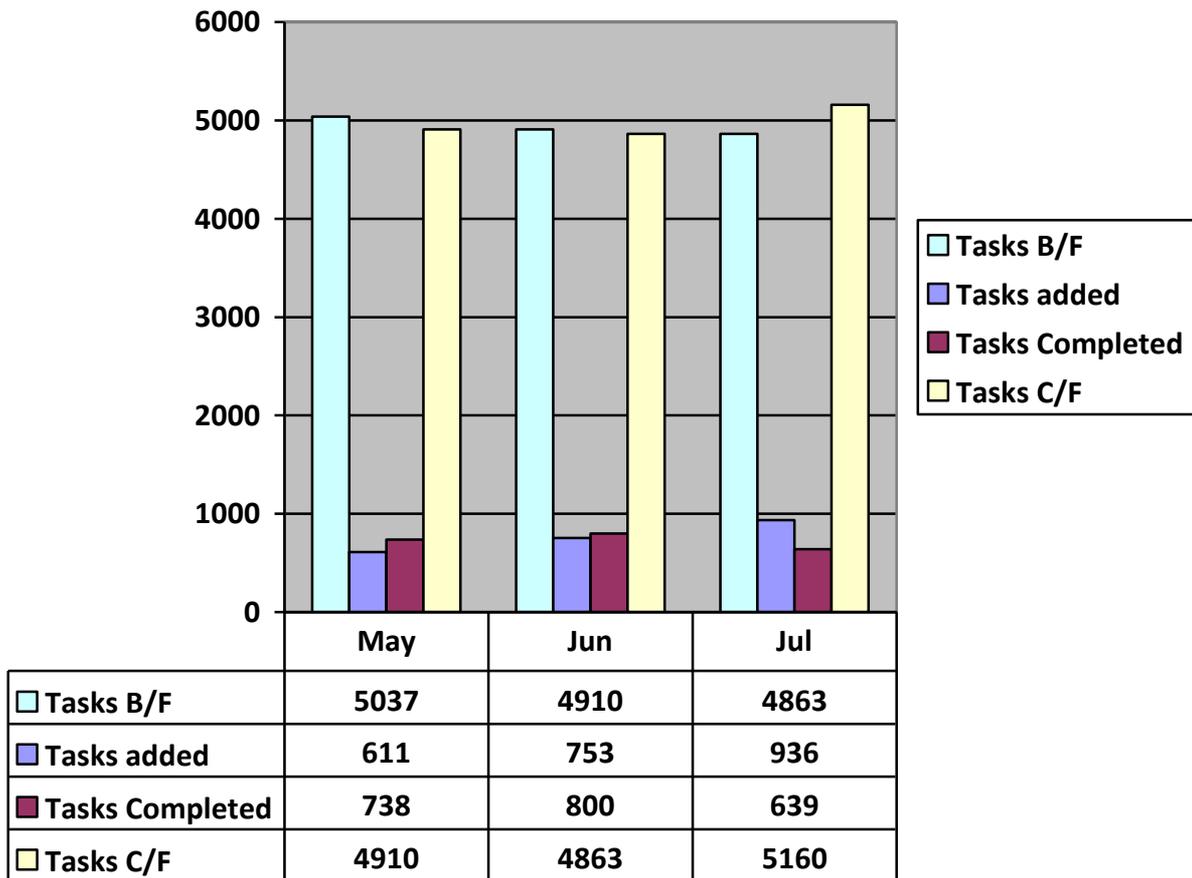
Team Performance Targets

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
		May 2020			June 2020			July 2020				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	53	96.23%	8	291	62.23%	48	28	96.43%	3		Large number of new starters were identified as part of year end process which impacted on June performance due to increased volume.
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)	78	19.23%	386	58	25.86%	502	81	18.52%	308		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)	56	69.64%	56	42	71.43%	36	48	95.83%	15		During Q1 2020/21 there was a rise in the number of leavers identified through the end of year reports received from employers which has impacted on performance.
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	3	66.67%	14	10	100%	15	7	100%	16		

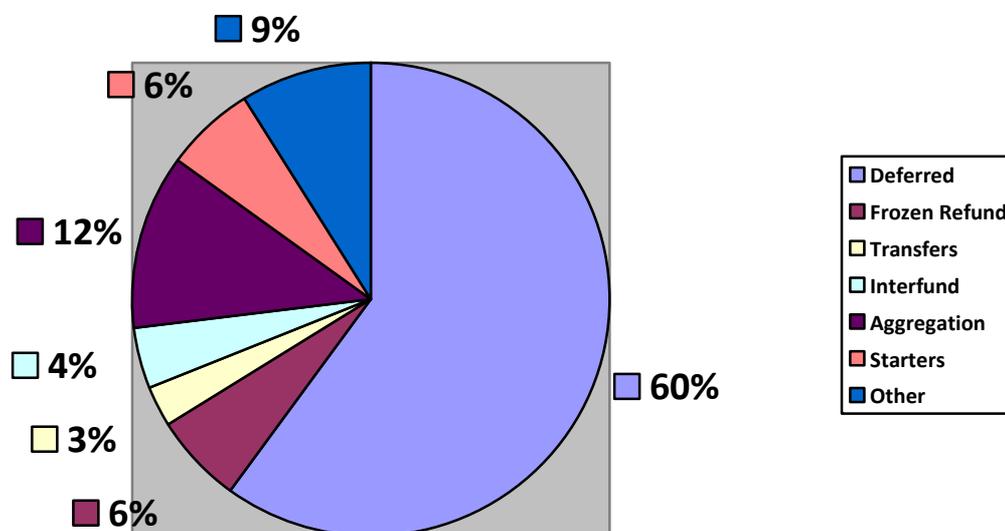
Team Performance Targets

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		May 2020			June 2020			July 2020				
Notify the amount of retirement benefits	20 working days from date of retirement	32	100%	3	25	100%	3	27	100%	5		
Provide a retirement quotation on request	15 working days from date of request	31	93.55%	12	30	86.67%	30	58	98.28%	9		There has been an increase in demand in July due to the staffing reduction consultation
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	34	88.24%	13	25	96%	7	24	95.83%	9		

Case levels



Outstanding Cases by Type



Member self-service

Scheme members registered	4124 (25%)
Number scheme members who accessed annual benefit statement Q1 Apr - Jun 2020.	392