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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
		August 2020		September 2020		October 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	6	100%	10	80%	68	70.59%	-	A new Pension Support Officer joined the team in October who has been concentrating on processing new starters.
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)	26	15.38%	20	35%	22	22.73%	-	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this 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)	37	64.86%	41	85.37%	46	86.96%	-	

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
		August 2020		September 2020		October 2020			
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	15	66.67%	10	100%	3	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	33	100%	34	100%	50	100%		There has been an increase in demand due to Croydon Council staffing review.
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	54	100%	67	100%	59	100%		There has been an increase in demand due to Croydon Council staffing review.

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
		August 2020		September 2020		October 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)	16	100%	21	100%	27	96.30%		There was 1 case which was not processed within the legal deadline during October as further information was required which resulted in the delay.
Provide all active and deferred members with annual benefit statements each year	By 31 st August	16300	97.84%	16690	98.69%				Work was been undertaken to confirm with employers that those who did not receive an annual are leavers who will now be processed and advised of their deferred benefits.

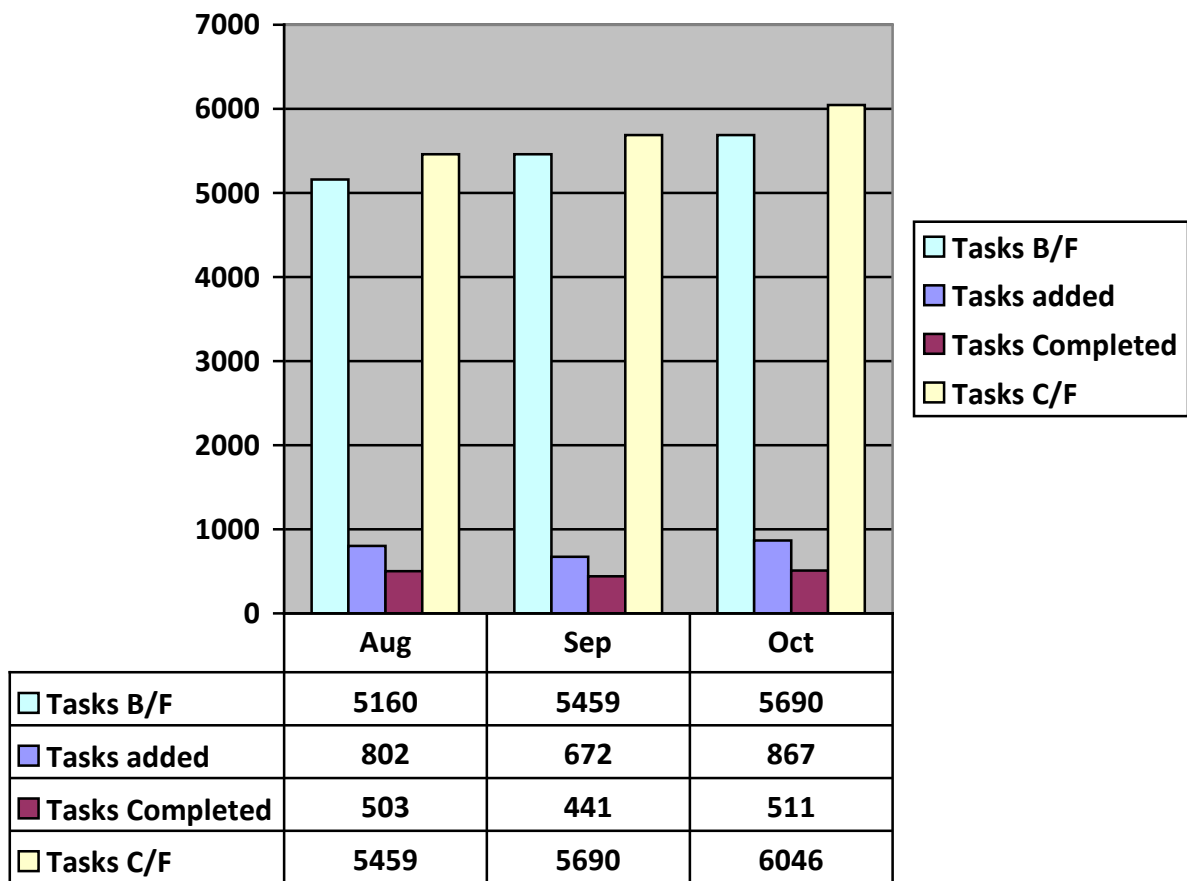
Team Performance Targets

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
		August 2020			September 2020			October 2020				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	6	66.67%	13	10	80%	21	68	63.24%	28	Red	A new Pension Support Officer joined the team in October who has been concentrating on processing new starters
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)	26	11.54%	891	20	30%	365	22	22.73%	710	Red	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this 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)	37	62.16%	50	41	56.10%	41	46	63.04%	36	Red	
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	15	66.67%	42	10	100%	7	3	100%	9	Green	

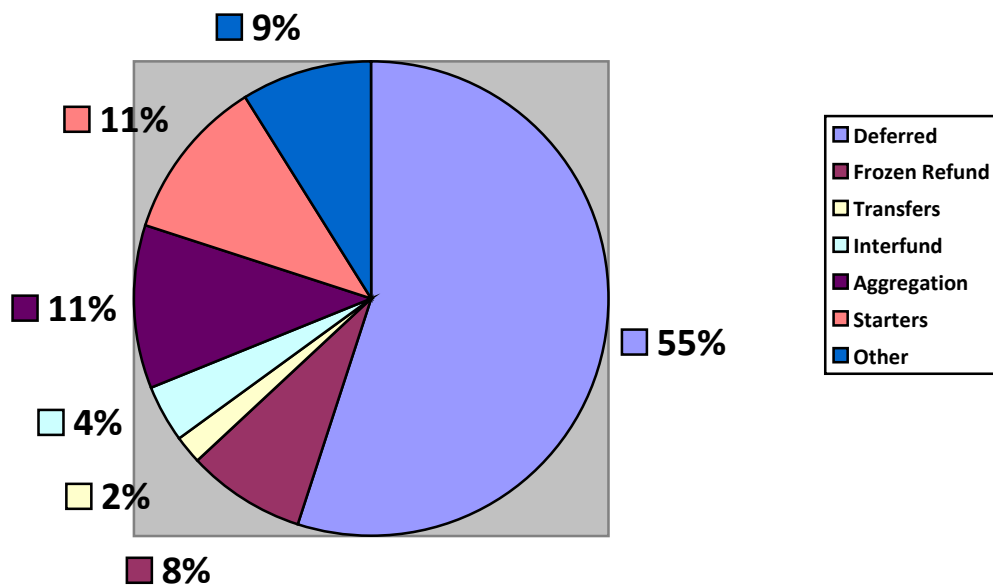
Team Performance Targets

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
		August 2020			September 2020			October 2020				
Notify the amount of retirement benefits	20 working days from date of retirement	33	100%	3	34	100%	2	50	100%	3	↗	
Provide a retirement quotation on request	15 working days from date of request	54	100%	3	67	95.52%	5	59	93.22%	6	↗	There has been an increase in demand due to Croydon Council staffing review.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	16	93.75%	7	21	95.24%	7	27	92.59%	8	↗	There were 2 cases which were not processed within target during October as further information was required resulting in delay.

Case levels



Outstanding Cases by Type



Member self-service

Scheme members registered	4476 (26%)
Number scheme members who accessed annual benefit statement Q2 Jun – Sep 2020.	1006