









Croydon Pensions Admin Team Performance Report

March 2021

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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
		January 2021		February 2021		March 2021			
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	156	89.10%	197	81.22%	183	49.18%	↓	Initiative being undertaken by pension support officer to clear new starters. As at end March there were 286 outstanding new starters, compared with 814 at end December. A further pension support officer has been recruited who will focus solely on new starters for the next 6 months to clear outstanding cases and ensure we keep on top of ongoing demand for 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)	14	7.14%	33	24.24%	44	31.25%	↑	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this backlog. The cases have now been passed over to Hymans who are undertaking analysis of the cases and completing some sample calculations for the Croydon pension team to verify.
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)	16	68.75%	55	72.73%	123	61.79%	↓	Due to resources needed to be redirected to other priority areas of work performance has been impacted. Resources are now being directed to leaver calculations on a daily basis. Achievement in the number of cases will be monitored for the next 3 months. In addition there are some process changes are being investigated as leaver tasks are being erroneously created when an employee changes jobs, rather than leaves which is artificially inflating the number of outstanding tasks.

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
		January 2021		February 2021					
To process and pay a refund	Two months from the date of request	10	100%	16	100%	14	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	3	100%	1	100%	4	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	45	100%	44	97.73%	1	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	196	100%	65	100%	74	100%	➡	During January there was an extraordinary increase in demand due to Croydon Council severance scheme.

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
		January 2021		February 2021					
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)	41	97.56%	33	100%	45	100%		
Provide all active and deferred members with annual benefit statements each year	By 31 st August								In 2020 an ABS was been issued for all members who were due to receive one


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
		January 2021			February 2021							
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	156	89.10%	16	197	80.20%	31	183	49.18%	70	↓	Initiative being undertaken by pension support officer to clear new starters. As at end March there were 286 outstanding new starters, compared with 814 at end December. A further pension support officer has been recruited who will focus solely on new starters for the next 6 months to clear outstanding cases and ensure we keep on top of ongoing demand for 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)	14	7.14%	663	33	21.21%	906	44	31.25%	383	↑	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this backlog. The cases have now been passed over to Hymans who are undertaking analysis of the cases and completing some sample calculations for the Croydon pension team to verify.
Inform a scheme member of their calculated benefits (refund or deferred) –	40 working days from date of notification (from employer or scheme member)	16	68.75%	43	55	56.36%	44	123	47.97%	72	↓	Due to resources needed to be redirected to other priority areas of work performance has been impacted. Resources are now being directed to leaver calculations on a daily basis. Achievement in the

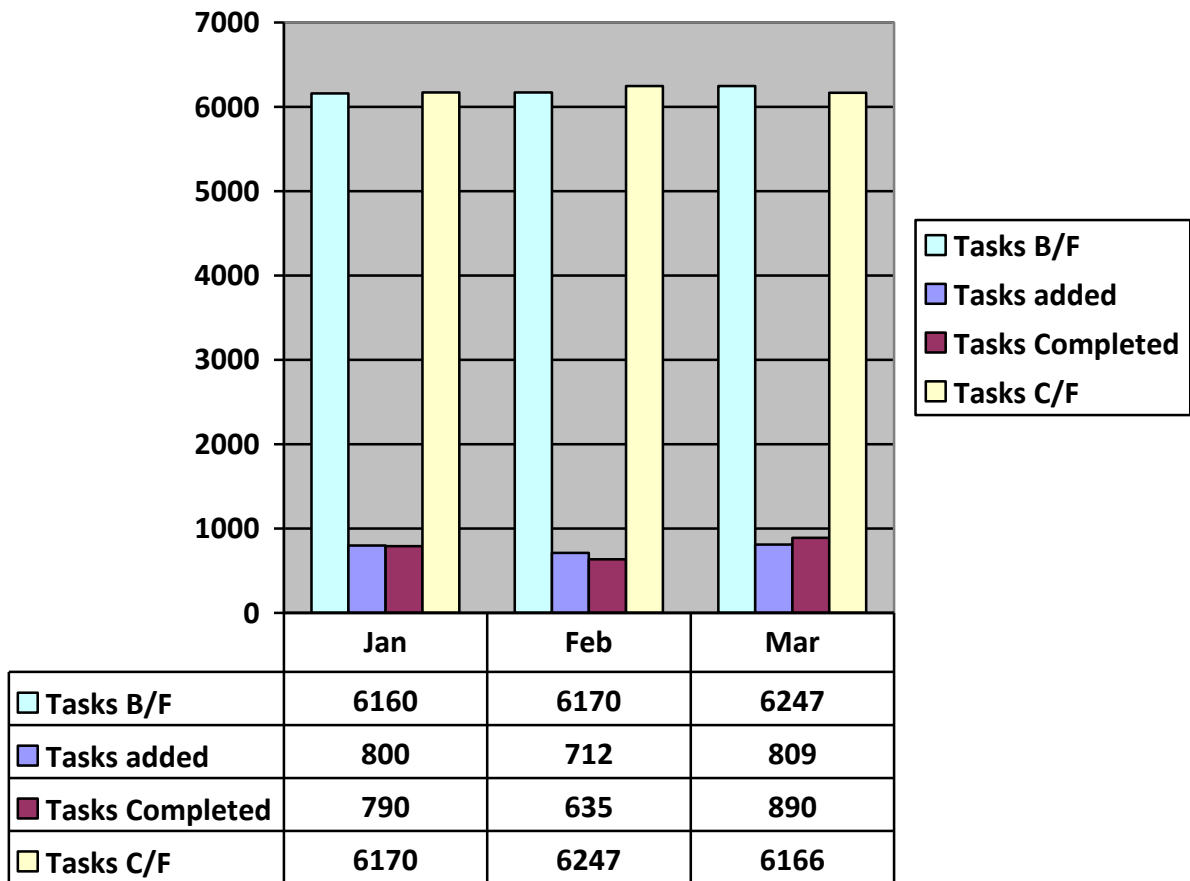
new cases												number of cases will be monitored for the next 3 months. In addition there are some process changes are being investigated as leaver tasks are being erroneously created when an employee changes jobs, rather than leaves which is artificially inflating the number of outstanding tasks.
To process and pay a refund	40 working days from the date of request	10	100%	2	16	100%	3	14	100%	3		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	3	66.67%	3	1	100%	9	2	50%	26		One case that was not processed within target timescale, taking 51 days to be processed..

Team Performance Targets

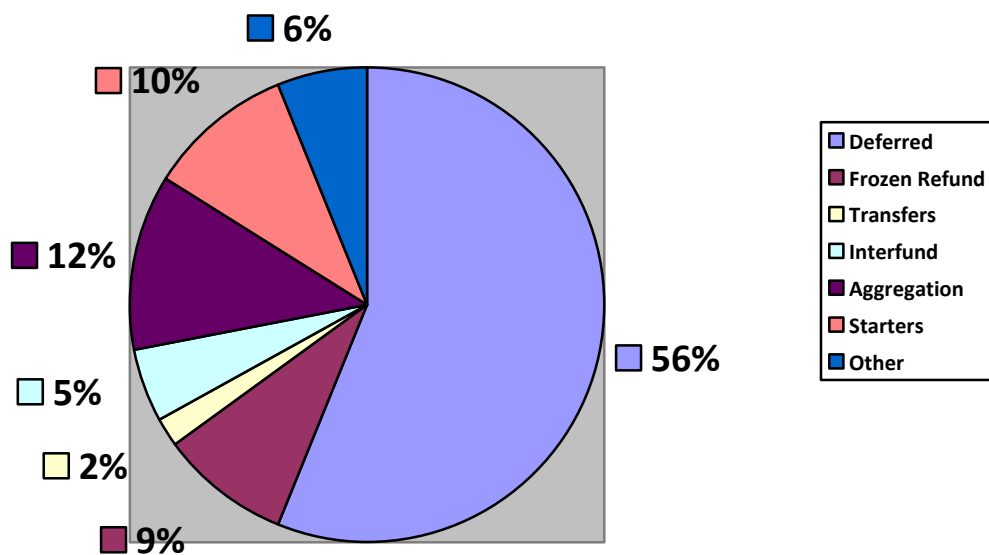
Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
January 2021				February 2021								
Notify the amount of retirement benefits	20 working days from date of retirement	45	100%	2	44	97.73%	3	1	100%	1		
Provide a retirement quotation on request	15 working days from date of request	196	100%	5	65	96.92%	5	74	95.95%	1		Small number of cases in February and March not processed within target timescales where further information was needed. In March there were 3

												cases which were not processed within 15 days and the maximum number of days taken was 24.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	41	97.56%	6	33	96.97%	5	45	100%	5		

Case levels



Outstanding Cases by Type



Member self-service

Scheme members registered	4781 (28.77%)
Number scheme members who accessed annual benefit statement Q4 Jan 2021 – Mar 2021	499