

<b>REPORT TO:</b>	<b>Local Pension Board</b> <b>8 July 2021</b>
<b>SUBJECT:</b>	<b>Croydon Pensions Administration Team Key Performance Indicators for the Period</b> <b>1 March 2021 to 31 May 2021</b>
<b>LEAD OFFICER:</b>	<b>Vicki Richardson</b> <b>Head of HR &amp; Finance Service Centre</b>

## **1. RECOMMENDATIONS**

The Board is asked to:

Note the Key Performance Indicators and the performance against these indicators set out in Appendix A to this report.

## **2. EXECUTIVE SUMMARY**

- 2.1 This report sets out Key Performance Indicators for the administration of the Local Government Pension Scheme Scheme (LGPS) for the three month period up to the end of May 2021.

## **3. DETAIL**

- 3.1 Good governance suggests that the performance of the administration of the Local Government Pension Scheme should be monitored. This report has been developed using the guidance published by CIPFA (Administration in the LGPS: A Guide for Pensions Authorities) and is reporting to the committee on the LGPS administration performance for the period 1 March 2021 to 31 May 2021. The indicators cover legal deadlines; team performance targets, case levels and take up of member self-service and the indicators and performance against these are detailed more fully in Appendix A to this report.

### **Commentary**

- 3.2 There has been an extraordinary demand on the pension administration team over the last few months to due to a Council wide voluntary severance scheme.
- 3.3 As priority was given to the voluntary severance scheme to ensure that scheme members had timely information at this critical time, resources were diverted away from other case types. In addition to the retirement estimates the team have met legal deadlines for processing retirements and deaths which are also of key importance to scheme members. However there has been an impact on processing other case types within target, such as new starters and deferred benefit calculations for leavers.

- 3.4 At end May 2021 there were 5860 workflow tasks outstanding which is a 4% decrease on the previous month.
- 3.5 Hymans Robertson have been engaged to clear the outstanding tasks relate to a historical backlog of deferred benefit cases. The high level project plan is shown as Appendix C.
- 3.6 A pension support officer has now been recruited who will focus solely on new starters for the next six months. In May 2021 the number of outstanding tasks for new starters decreased by over 67%.
- 3.7 Due to resources needing to be redirected the number of outstanding deferred benefit cases for leavers has increased over the last few months, with 823 tasks outstanding at end May. Changes have been made within the administration team to ensure a resource is allocated to process leaver calculations on a daily basis. Achievement in the number of cases will be monitored for the next 3 months at which point performance will be reviewed and alternative resourcing options considered if necessary.
- 3.8 In addition to normal casework the team are also processing year end data received from employer's in preparation for the issue of Annual Benefit statements by 31 August 2021.
- 3.9 Earlier in the year we had successfully recruited to all vacancies in the pension administration team. Following that we had 3 further vacancies arise due to resignation which are all being actively recruited to with closing dates for application scheduled for end June 2021.
- 3.7 The latest development on the McCloud ruling in the LGPS is the Written Ministerial Statement from the LGPS Minister Luke Hall who made a statement on 13 May 2021 confirming the key elements of the changes to the LGPS regulations in order to implement the McCloud remedy. LGPS regulations are expected to come into force from 1 April 2023. Whilst draft regulation are not expected until later in the year we are actively investigating options for resourcing the required data gathering exercise.
- 3.9 Member self-service take up as at end March 2021 was 28.77%, which is an increase of 3.77% compared with March 2020. The member self-service communication plan for 2021-22 is shown as Appendix B

#### **4. DATA PROTECTION IMPLICATIONS**

##### **4.1 WILL THE SUBJECT OF THE REPORT INVOLVE THE PROCESSING OF 'PERSONAL DATA'?**

NO

**Approved by:** Chris Buss, Interim Director of Finance, Investment and Risk,  
S151 Officer

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**CONTACT OFFICER:**

Victoria Richardson - Head of HR & Finance Service Centre  
ext. 62460.

**BACKGROUND DOCUMENTS:**

None

**Appendices**

Appendix A: Croydon Pensions Admin Team Performance Report, May 2021  
Appendix B: Member Self-service Communication Plan 2021-22  
Appendix C: Deferred Project - High Level Project Plan