









Croydon Pensions Admin Team Performance Report

January 2023



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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
		November 2022		December 2022		January 2023			
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	191	98.95%	268	100%	303	99.01%		4 cases missed target January 2023
Inform a scheme member of their calculated benefits (refund or deferred)	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	58	79.31%	60	81.67%	53	75.47%		The team's focus was on other areas this quarter with more interfund and aggregation tasks being completed. This will help with future leaver cases as aggregation can cause delays in processing leavers.

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 2022		December 2022		January 2023			
To process and pay a refund	Two months from the date of request	7	100%	20	100%	18	100%		
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	2	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	60	100%	37	100%	45	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	63	100%	36	100%	76	100%		

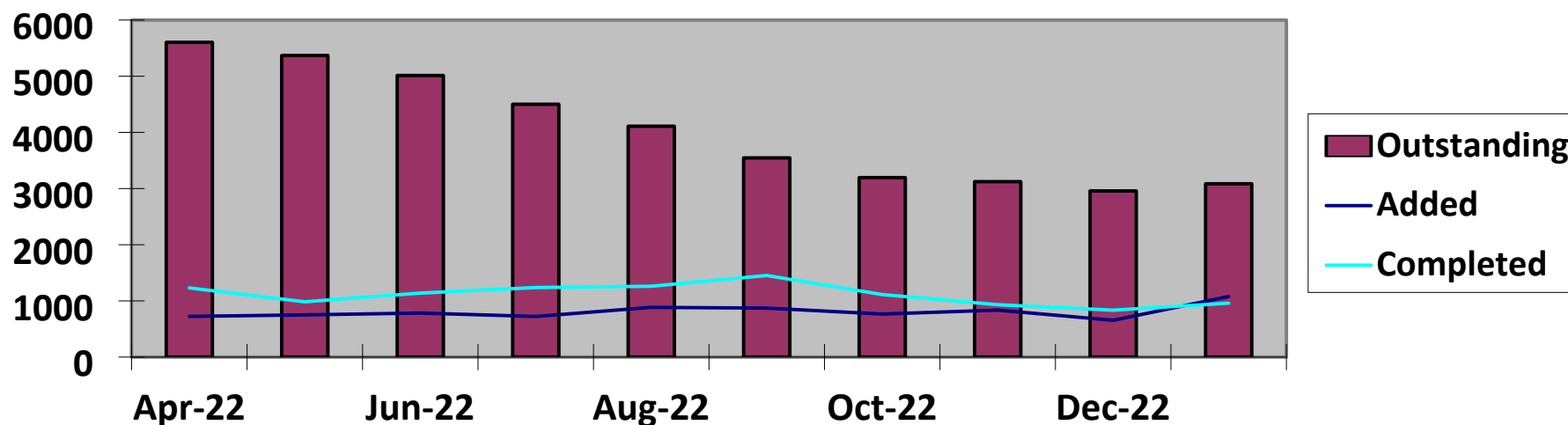
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		November 2022		December 2022		January 2023			
Calculate and notify (dependent(s) of amount 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)	30	100%	14	92.86%	37	100%	↑	One case missed target in December 2022. Previous Interim Director of Finance was delayed in signing off the death grant.
Provide all active and deferred members with annual benefit statements each year	By 31 st August								

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 2022			December 2022			January 2023				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	191	97.38%	5	268	100%	1	303	98.68%	6		5 cases missed target in December 2022 and 4 cases missed target in January 2023.
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	58	79.31%	242	60	80%	111	53	75.47%	97		The team's focus was on other areas this quarter with more interfund and aggregation tasks being completed. This will help with future leaver cases as aggregation can cause delays in processing leavers.

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 2022			December 2022			January 2023				
To process and pay a refund	40 working days from the date of request	7	100%	3	20	100%	3	18	100%	1		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	2	100%	1	1	100%	1	4	100%	2		
Notify the amount of retirement benefits	20 working days from date of retirement	60	100%	2	37	100%	1	45	100%	2		
Provide a retirement quotation on request	15 working days from date of request	63	100%	4	36	100%	2	76	98.68%			One case missed target in January 2023. This was due to issues accessing historic payroll systems and delays in obtaining information from the employer.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	30	100%	3	14	92.86%	9	37	100%	2		One case missed target in December 2022. Previous Interim Director of Finance was delayed in signing off the death grant.

Case levels



The above chart tracks the number of new cases added and case completed each month against the number of outstanding cases.

Of the outstanding cases approximately 30% relate to aggregation and interfund adjustment case where we are waiting for information from other LGPS funds.

Member self-service Q3

Total Scheme members registered	6071 (22.98%)
Number scheme members who accessed annual benefit statement Q2 Jul 2022 – Sep 2022	447
Breakdown by member status	
• Actives	29.62%
• Deferred	20.48%
• Pensioners & Dependents	19.00%