









Croydon Pensions Admin Team Performance Report

June 2024

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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
		February 2024	March 2024	March 2024	April 2024	April 2024			
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	150	100%	210	100%	140	99.29%	↓	One case missed target in April 2024.
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)	69	84.06%	66	87.88%	54	92.59%	↑	Following a review of resourcing and processes in the first quarter of 2024 we have implimented some changes. We have seen some improvements and will continuew to monitor to ensure long term improvements.

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
		February 2024		March 2024		April 2024			
To process and pay a refund	Two months from the date of request	8	100%	16	100%	9	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	4	100%	5	100%	0	NA	➡	
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	55	100%	52	100%	55	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	72	100%	67	100%	64	100%	➡	

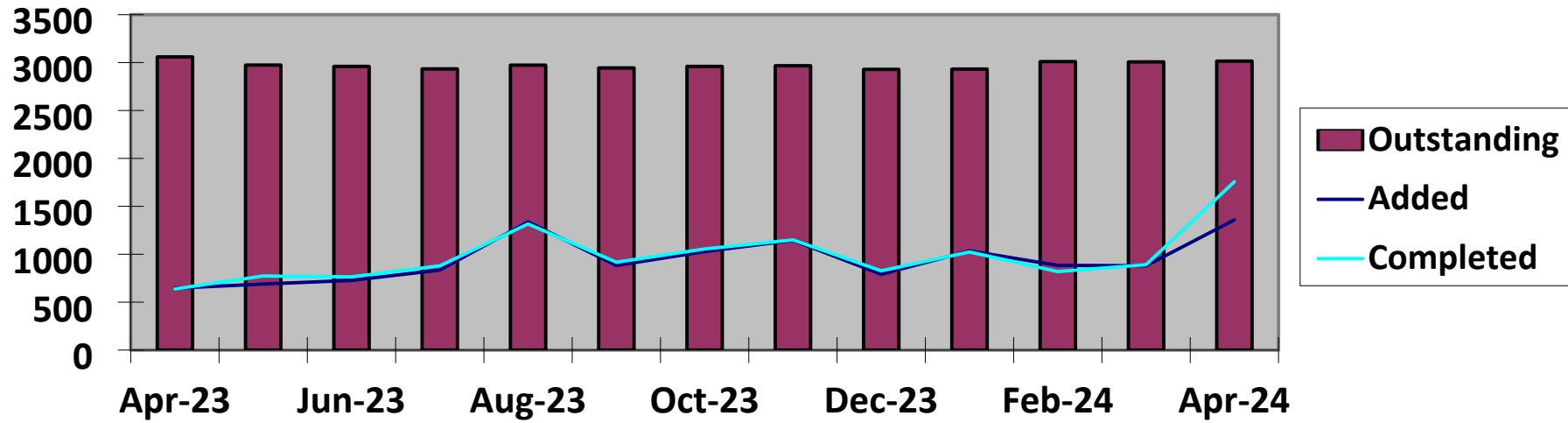
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		February 2024		March 2024		April 2024			
Calculate and notify (dependent(s) of amount of 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)	32	100%	33	100%	23	100%	↑	
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
		February 2024			March 2024			April 2024				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	150	100%	1	210	100%	1	140	99.29%	2	↓	One case missed target in April 2024.
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	69	84.06%	33	66	86.36%	39	54	88.89%	43	↑	<p>Leaver calculations continue to be below legal and Croydon KPIs.</p> <p>Following a review of how leavers calculations are resourced within the team we have implimented some new measures. We have some seen some initial improvments but will monitor process to ensure long term improvments.</p>

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
		February 2024			March 2024			April 2024				
To process and pay a refund	40 working days from the date of request	8	100%	3	16	100%	2	9	100%	1		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	4	100%	2	5	100%	2	0	NA	NA		
Notify the amount of retirement benefits	20 working days from date of retirement	55	100%	1	52	100%	2	55	100%	1		
Provide a retirement quotation on request	15 working days from date of request	72	100%	2	67	98.51%	2	64	100%	2		
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	32	100%	2	33	100%	2	23	100%	2		

Case levels



Member self-service

		Increase from previous Q
Total Scheme members registered	6680 (25.11%)	↑
Number scheme members who accessed annual benefit statement in Q4 2023/24	783	↑
Breakdown by member status		
• Actives	32.24%	↑
• Deferred	22.07%	↑
• Pensioners & Dependents	21.61%	↑