

Croydon Pensions Admin Team Performance Report

May 2021

Contents

- Reference Key Table 3
- Legal Deadlines 4
- Team Performance Targets 7
- Team Performance Targets **Error! Bookmark not defined.**
- Case levels 9
- Outstanding Cases by Type..... 10
- Member self-service 10

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
		March 2021		April 2021		May 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	183	49.18%	155	47.74%	268	31.34%	↓	A pension support officer has been recruited who will focus solely on new starters for the next 6 months to keep on top of ongoing demand for processing new starters. Whilst the % achieved in the legal deadline was low in May this is as a result as a large number of old cases being processed.
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)	44	31.25%	21	23.81%	19	10.53%	↓	Historical backlog has now been passed to Hymans Robertson for processing.
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)	123	61.79%	70	71.43%	66	77.27%	↑	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.

Legal Deadlines

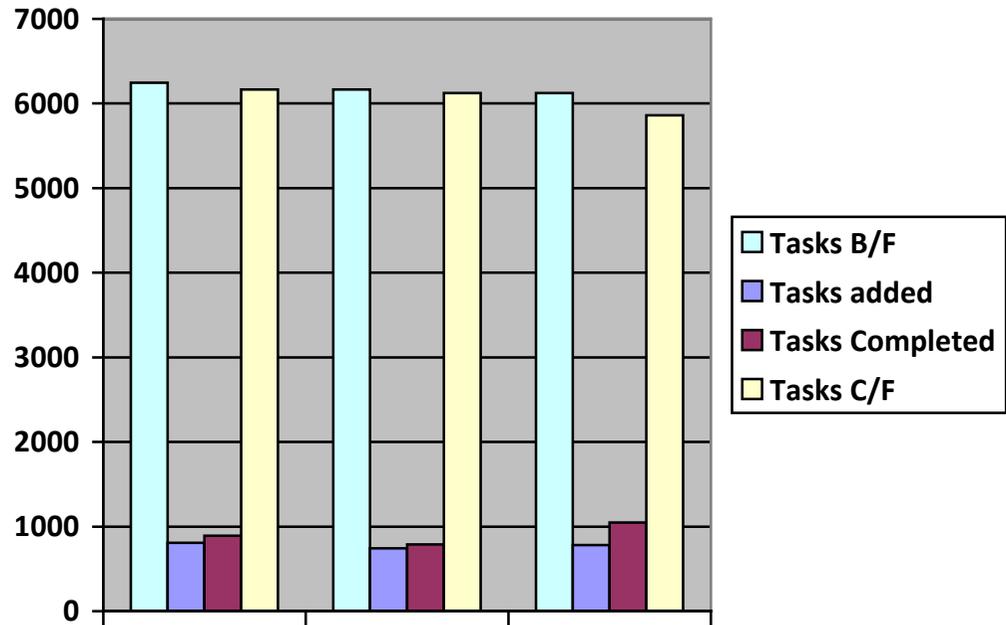
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		March 2021		April 2021		May 2021			
To process and pay a refund	Two months from the date of request	14	100%	18	100%	8	100%		
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	4	100%	1	100%	2	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	1	100%	54	100%	44	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	74	100%	118	99.15%	89	100%		

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
		March 2021			Apr-21			May-21				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	183	49.18%	70	155	47.44%	77	268	31.34%	97	↓	A pension support officer has been recruited who will focus solely on new starters for the next 6 months to keep on top of ongoing demand for processing new starters. Whilst the % achieved in the legal deadline was low in May this is as a result as a large number of old cases being processed.
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)	44	31.25%	383	21	23.81%	783	19	10.53%	769	↑	Historical backlog has now been passed to Hymans Robertson for processing.
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)	123	47.97%	72	70	54.29%	45	66	68.18%	47	↓	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.
To process and pay a refund	40 working days from the date of request	14	100%	3	18	100%	3	8	100%	9	→	

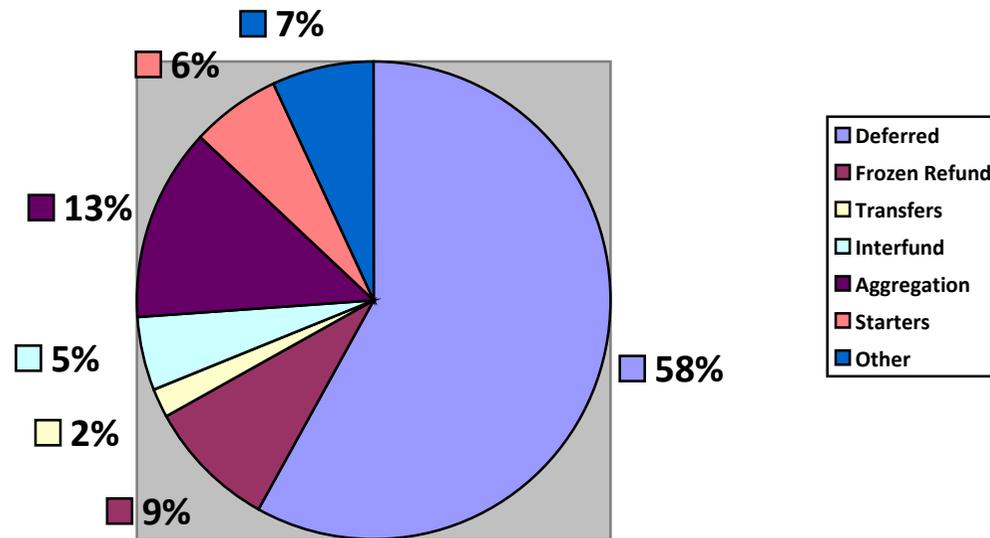
Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		March 2021			Apr-21			May-21				
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	2	50%	26	1	100%	1	2	50%	7		During May one case was not processed within target timescale, taking 45 days.
Notify the amount of retirement benefits	20 working days from date of retirement	1	100%	1	54	100%	3	44	100%	3		
Provide a retirement quotation on request	15 working days from date of request	74	95.95%	1	118	89.83%	6	89	93.26%	5		
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	45	100%	5	23	91.30%	6	36	100%	6		

Case levels



	Mar	Apr	May
Tasks B/F	6247	6166	6123
Tasks added	809	744	783
Tasks Completed	890	787	1046
Tasks C/F	6166	6123	5860

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