

Croydon Pensions Admin Team Performance Report

July 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
		May 2021		June 2021		July 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	268	31.34%	172	45.35%	116	65.52%		<p>We have a pension support officer who is focussing solely on new starters for the next few months to keep on top of ongoing demand for processing new starters.</p> <p>Whilst the % achieved in the legal deadline is below target this is as a result as a large number of old cases being processed.</p> <p>The total amount of new starters outstanding decreased from 530 at end April to 134 at end July.</p>
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)	85	62.35%	101	44.55%	132	42.42%		<p>Historical backlog has now been passed to Hymans Robertson for processing. As old cases are processed this will impact on performance against target.</p> <p>Due to resources needing to be redirected to other priority areas of work performance on new cases has been impacted.</p> <p>We have recruited a new Pension Officer is starting in September who will be solely focussing on this case type. Number of tasks outstanding will continue to be monitored</p>

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
		May 2021		June 2021		July 2021			
To process and pay a refund	Two months from the date of request	8	100%	9	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%	1	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	44	100%	78	100%	53	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	89	100%	70	97.14%	72	100%		

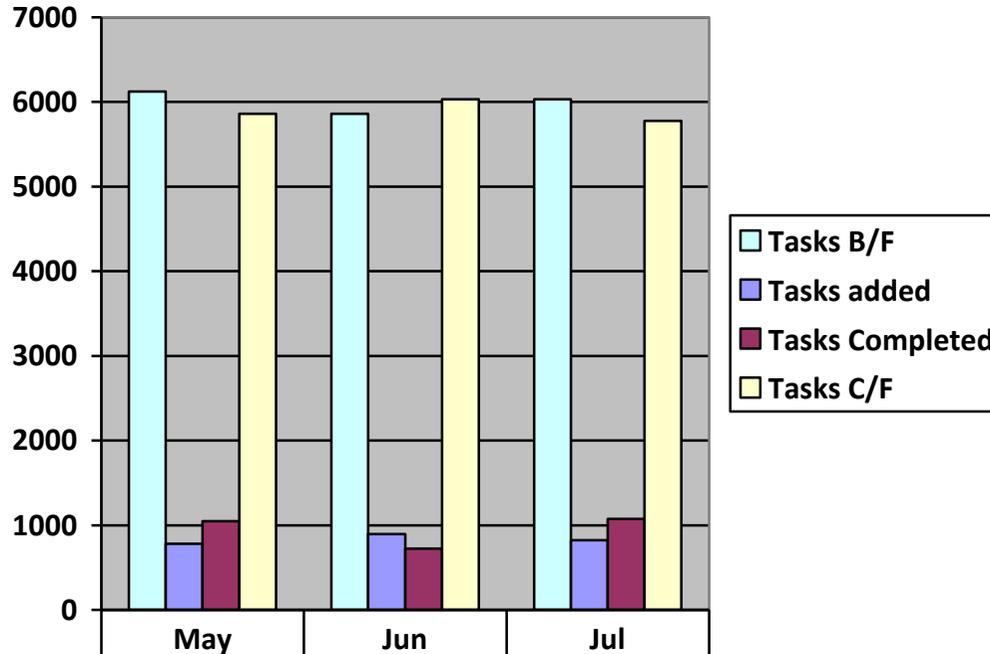
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		May 2021		June 2021		July 2021			
Calculate and notify (dependent(s) of amount of death 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)	36	100%	21	100%	16	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
		May-21			June 2021			July 2021				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	268	31.34%	97	172	44.77%	47	116	62.07%	59		<p>We have a pension support officer who is focussing solely on new starters for the next few months to keep on top of ongoing demand for processing new starters.</p> <p>Whilst the % achieved in the legal deadline is below target this is as a result as a large number of old cases being processed.</p> <p>The total amount of new starters outstanding decreased from 530 at end April to 134 at end July.</p>
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)	85	62.35%	208	101	44.55%	298	132	41.67%	471		<p>Historical backlog has now been passed to Hymans Robertson for processing. As old cases are processed this will impact on performance against target.</p> <p>Due to resources needing to be redirected to other priority areas of work performance on new cases has been impacted.</p> <p>We have recruited a new Pension Officer is starting in September who will be solely focussing on this case type. Number of tasks outstanding will continue to be monitored</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
		May-21			June 2021			July 2021				
To process and pay a refund	40 working days from the date of request	8	100%	9	9	100%	7	18	100%	3		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	2	50%	7	1	100%	1	1	100%	1		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	44	100%	3	78	100%	3	53	100%	2		
Provide a retirement quotation on request	15 working days from date of request	89	93.26%	5	70	92.19%	8	72	95.83%	3		In July there were 2 cases not processed within team target with the longest case taking 17 days.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	36	100%	6	21	100%	11	16	100%	4		

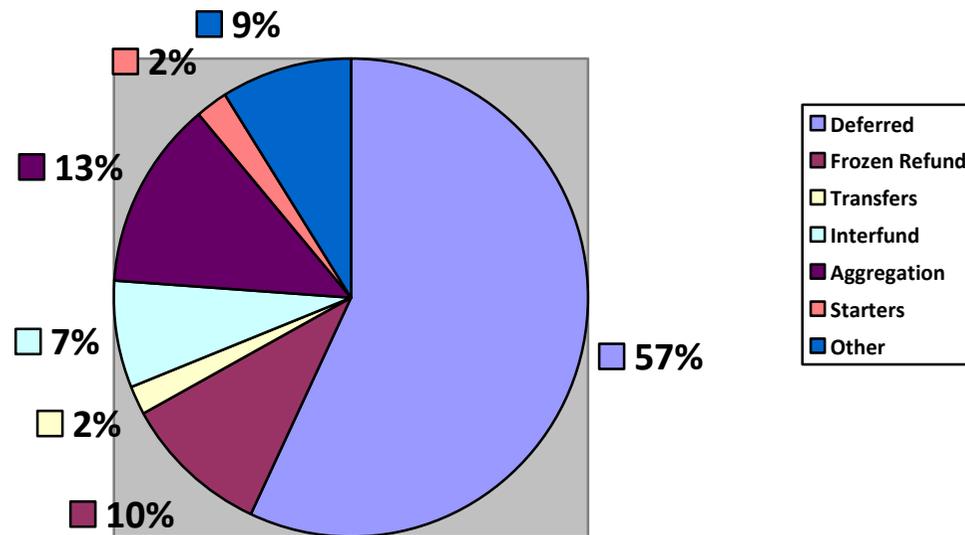
Case levels



	May	Jun	Jul
Tasks B/F	6123	5860	6031
Tasks added	783	895	822
Tasks Completed	1046	724	1075
Tasks C/F	5860	6031	5778

44% outstanding tasks relate to historic backlog of deferred benefit cases

Outstanding Cases by Type



Member self-service

Scheme members registered	4888 (27%)
Number scheme members who accessed annual benefit statement Q1 Apr 2021 – Jun 2021	547