

Croydon Pensions Admin Team Performance Report

March 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
		December 2022		January 2023		February 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	268	100%	303	99.01%	147	100%		4 cases missed target in 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)	60	81.67%	53	75.47%	58	67.24%		12 cases missed target in December 2022. 13 cases missed target in January 2023. 19 cases missed target in February 2023.

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
		December 2022		January 2023		February 2023			
To process and pay a refund	Two months from the date of request	20	100%	18	100%	9	100%		
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	1	100%	4	100%	3	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	37	100%	45	100%	52	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	36	100%	76	100%	74	98.65%		2 cases missed target in February 2023. One case was delayed while the deferred benefit was calculated. The other case was a completed case that was incorrectly reopened and task comments added. Training has been provided to the team to prevent this in the future.

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
		December 2022		January 2023		February 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)	14	92.86%	37	100%	23	100%		One case missed target in December 2022. This was due to a delay in signing off the death grant payment.
Provide all active and deferred members with annual benefit statements each year	By 31 st August								

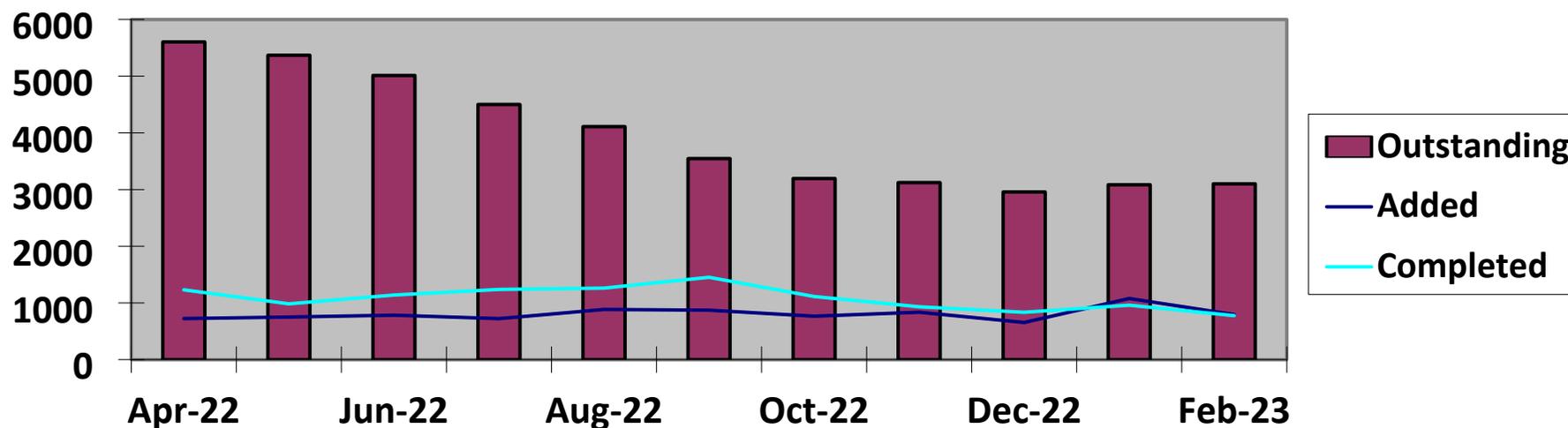
Team Performance Targets

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
		December 2022			January 2023			February 2023				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	268	100%	1	303	98.68	6	147	100%	0		
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	60	80%	111	53	75.47%	97	58	67.24%	249		

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
		December 2022			January 2023			February 2023				
To process and pay a refund	40 working days from	20	100%	3	18	100%	1	9	100%	2		

	the date of request											
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	1	100%	1	4	100%	2	3	100%	1		
Notify the amount of retirement benefits	20 working days from date of retirement	37	100%	1	45	100%	2	52	100%	3		
Provide a retirement quotation on request	15 working days from date of request	36	100%	2	76	98.68%	3	74	97.30%	19		One case missed target in January 2023. Two cases missed target in February 2023. One case was delayed while the deferred benefit was calculated. The other case was a completed case that was incorrectly reopened and task comments added. Training has been provided to the team to prevent this in the future.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	14	92.86%	9	37	100%	2	23	100%	2		One case missed target in December 2022. Delay in death grant being signed off.

Case levels



Number of outstanding cases

The Backlog Project tracing tasks have been removed as they do not represent work to be completed.

Member self-service

Total Scheme members registered	6010 (22.74%)
Number scheme members who accessed annual benefit statement Q2 Jul 2022 – Sep 2022	737
Breakdown by member status	
• Actives	30.14%
• Deferred	20.25%
• Pensioners & Dependents	17.98%

Contributions Monitoring

Contributions reconciled to schedules	% Completed
October 2022	98.62%
November 2022	100%
December 2022	99.31%