

Croydon Pensions Admin Team Performance Report

September 2023

Contents

- Reference Key Table.....3
- Legal Deadlines.....4
- Team Performance Targets6
- Case levels.....9
- Member self-service9

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 2023		June 2023		July 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	86	100%	74	97.30%	107	99.07%	↑	1 case missed target in May, 2 cases missed target in June and 1 case missed target in July 2023. We expect there to be a higher number of starter cases following completion of the end of year processes.
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)	64	85.94%	65	73.85%	105	60%	↓	Many deferred benefit calculations were delayed due to outstanding interfund and aggregation cases. The team have been focusing on Blitz Days and a change in aggregation process to try and eliviate this issue. Interfund transfers had been put on hold while we waited for new factors from GAD. The testing and implimenation of the bulk leaver calculations has also impacted on the KPIs for leavers. Annual leave during the summer has also had a impact as the team have been focusing on retirements and deaths as a priority over leaver calculations.

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 2022		June 2023		July 2023			
To process and pay a refund	Two months from the date of request	13	100%	13	100%	14	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	1	100%	0	N/A	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	57	100%	57	100%	51	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	77	98.70%	68	98.53%	70	100%	⬆	2 cases missed target in May 2023. This was the result of delays trying to trace the members. 1 case missed target in June 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
		May 2023		June 2023		July 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)	28	96.43%	30	100%	28	100%%		1 case missed target in May 2023. A review of the case found the reply due indicator had not been set correctly by one of the team. Training has been provided.
Provide all active and deferred members with annual benefit statements each year	By 31 st August								

Team Performance Targets

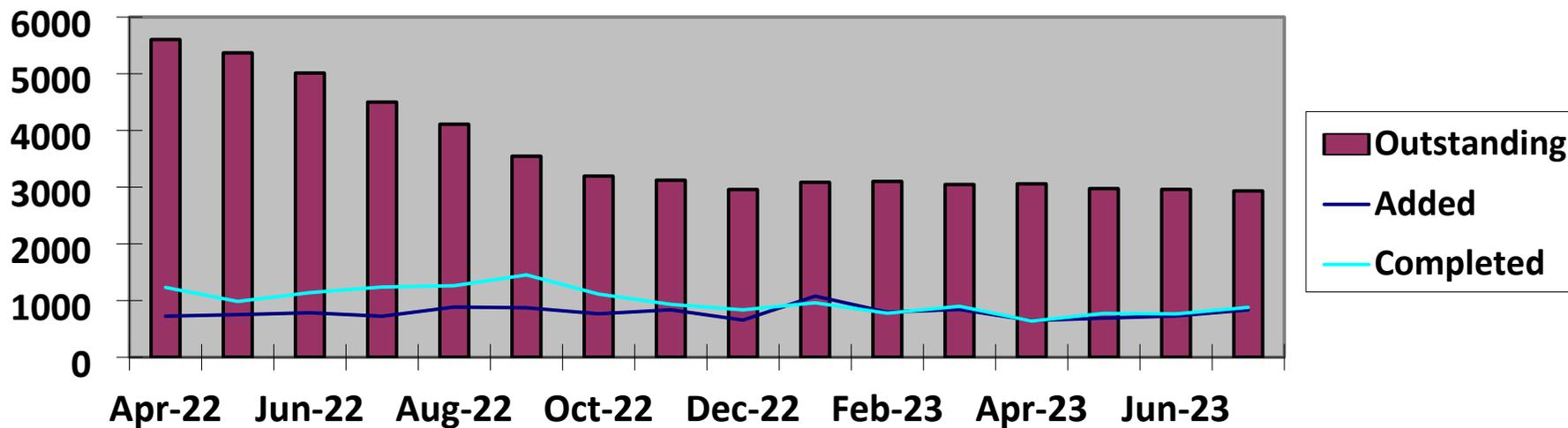
Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		May 2023			June 2023			July 2023				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	86	98.84%	1	74	97.30%	5	107	99.07%	2	↑	<p>1 case missed target in May, 2 cases missed target in June and 1 case missed target in July 2023.</p> <p>We expect there to be a higher number of starter cases following completion of the end of year processes.</p>
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	64	84.38%	76	65	73.85%	79	105	60%	214	↓	<p>Many deferred benefit calculations were delayed due to outstanding interfund and aggregation cases. The team have been focusing on Blitz Days and a change in aggregation process to try and eliviate this issue.</p> <p>Interfund transfers had been put on hold while we waited for new factors from GAD. The testing and implimenation of the bulk leaver calculations</p>

													has also impacted on the KPIs for leavers. Annual leave during the summer has also had an impact as the team have been focusing on retirements and deaths as a priority over leaver calculations.
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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 2023			June 2023			July 2023				
To process and pay a refund	40 working days from the date of request	13	100%	1	13	100%	2	14	100%	1		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	1	100%	1	0	N/A	N/A	2	100%	1		
Notify the amount of retirement benefits	20 working days from date of retirement	57	100%	2	57	100%	2	51	100%	1		
Provide a retirement quotation on request	15 working days from date of request	77	97.40%	7	68	98.53%	3	70	100%	2		
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	28	96.43%	7	30	96.67%	4	28	92.86%	9		1 case missed target in May 1 case missed target in June 2 cases missed target in July. The primary reason for these is the reply due/reply received

indicator on the task had not been set correctly. Where cases take a long time, for example we are trying to trace NOK or waiting for information, it is easy for these indicators to be missed. Training and guidance notes have been issued to the team again.

Case levels



Number of outstanding cases