

# Croydon Pensions Admin Team Performance Report

December 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
		August 2023		September 2023		October 2023			
<b>Send a notification of joining the LGPS to a scheme member</b>	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	90	98.89%	212	100%	316	100%		<p>We experienced a higher number of starters over the summer following the end of year processes.</p> <p>September and October always see an increase in starts due to the start of the academic year.</p>
<b>Inform a scheme member of their calculated benefits (refund or deferred)</b>	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	128	72.66%	34	73.53%	71	60.56%		<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. The testing and implimenation of the bulk leaver calculations has also impacted on the KPIs for leavers.</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
		August 2023		September 2023		October 2023			
<b>To process and pay a refund</b>	Two months from the date of request	18	100%	13	100%	18	100%	➡	
<b>Obtain transfer details for transfer in, calculate and provide quotation to member</b>	Two months from the date of request	1	100%	2	100%	2	100%	➡	
<b>Notify the amount of retirement benefits</b>	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	33	100%	71	98.59%	71	100%	⬆	One case missed target in September 2023.
<b>Provide a retirement quotation on request</b>	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	69	98.55%	66	100%	86	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
		August 2023		September 2023		October 2023			
<b>Calculate and notify (dependent(s) of amount of death benefits</b>	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)	21	100%	20	100%	34	100%		
<b>Provide all active and deferred members with annual benefit statements each year</b>	By 31 <sup>st</sup> August	Active	100%						Increase from 2022 figures of 92.30% published by the 31 August 2022.
		Deferred	90.33%						
		<u>Total</u>	<u>94.61%</u>						

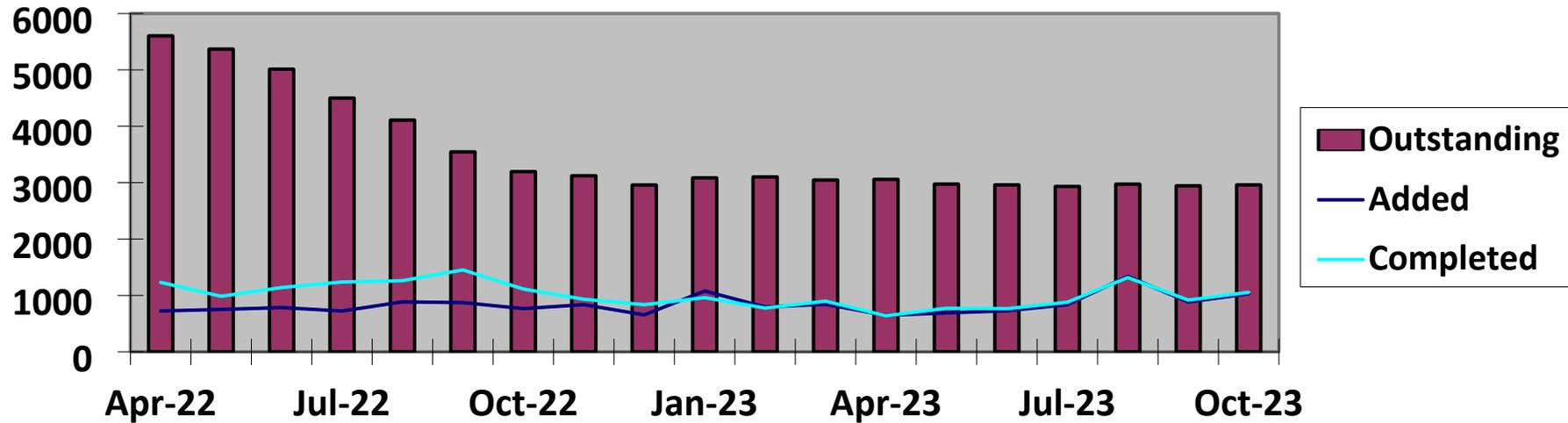
# Team Performance Targets

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
		August 2023			September 2023			October 2023				
<b>Send a notification of joining the LGPS to a scheme member</b>	30 days from date of notification of joining member	90	99.07%	2	212	98.89%	3	316	100%	4		
<b>Inform a scheme member of their calculated benefits (refund or deferred)</b>	40 working days from date of notification (from employer or scheme member)	128	71.09%	166	34	73.53%	84	71	57.75%	142		<p>Processing leaver calculations within legal and fund level timeframes remains a challenge for the team. Leaver calculations are particularly vulnerable to delays caused by interfund transfers, aggregations and TUPE transfers. Spikes in other workload areas do draw resource away from leaver calculations.</p> <p>We recognise the issue and leavers are forming a key part of our work plan for 2024. Leavers account for approx 50% of our workload and we need to ensure this is resources accordingly.</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
		August 2023			September 2023			October 2023				
<b>To process and pay a refund</b>	40 working days from the date of request	18	100%	1	13	100%	5	18	100%	1		
<b>Obtain transfer details for transfer in, calculate and provide quotation to member</b>	40 working days from the date of request	1	0%	13	2	100%	1	2	100%	0		The one case in August 2023 missed target while we waited for revised factors to be issued by GAD.
<b>Notify the amount of retirement benefits</b>	20 working days from date of retirement	33	100%	1	71	98.59%	9	71	100%	2		Once case missed target in September 2023.
<b>Provide a retirement quotation on request</b>	15 working days from date of request	69	97.10%	6	66	100%	4	86	96.51%	3		2 cases missed target in August. 3 cases missed target in October. Upon investigation these cases had complex elements which required escalation to senior members of the team.
<b>Calculate and notify (dependent(s) of amount of death benefits</b>	20 working days from receipt of all information	21	95.24%	3	20	100%	2	34	94.12%	7		1 case missed target in August 2023 because a reply due was not correctly set on the task. 2 cases missed target in October 2023. One case was delayed as the family would not provide widow's details.

The second case was completed in August within target but was later reopened following late notification of a returned payment.

## Case levels



## Member self-service

		Increase from previous Q
Total Scheme members registered	6497 (24.42%)	↑
Number scheme members who accessed annual benefit statement in Q2 2023/24	1095	↑
Breakdown by member status		
• Actives	31.84%	↑
• Deferred	21.78%	↑
• Pensioners & Dependents	20.21%	↑