









Croydon Pensions Admin Team Performance Report

September 2024



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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 2024		June 2024		July 2024			
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	74	100%	69	100%	122	100%		
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)	97	88.66%	82	81.71%	62	80.65%		

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 2024		June 2024		July 2024			
To process and pay a refund	Two months from the date of request	41	100%	21	100%	21	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	4	100%	2	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	52	100%	48	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	68	100%	63	100%	72	100%	➡	

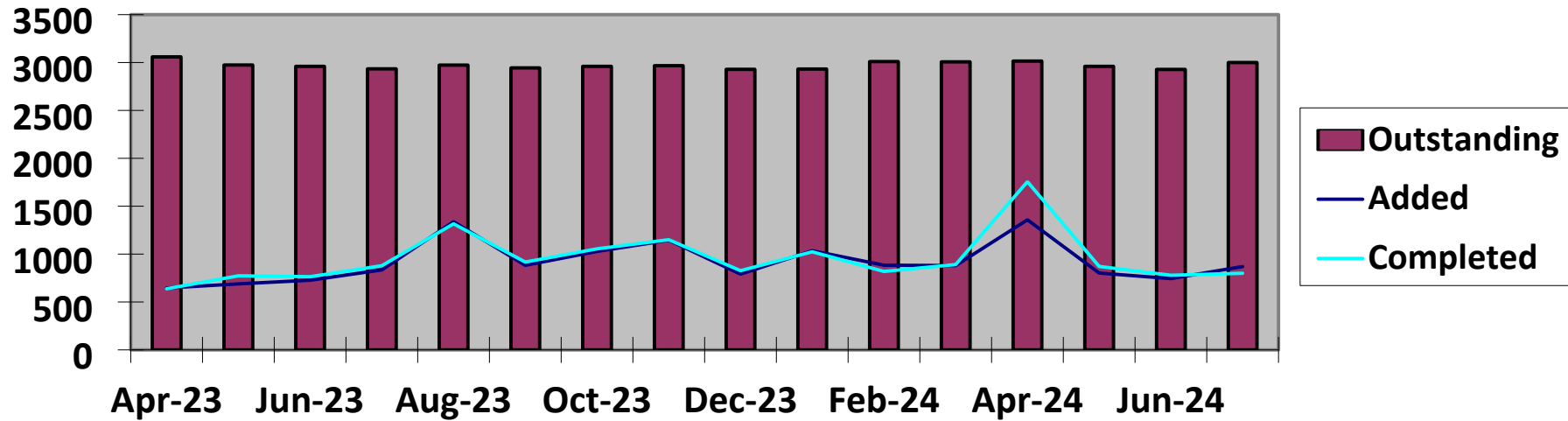
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		May 2024		June 2024		July 2024			
Calculate and notify (dependent(s) of amount of death 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	100%	36	100%	24	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 2024			June 2024			July 2024				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	74	100%	2	69	98.55%	1	122	100%	1		
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	97	87.63%	77	82	79.27%	44	62	79.03%	48		Calculations of leavers continue to fall below KPI levels. We do expect to see a slight decrease during the summer months as team members are on annual leave and it is harder to obtain information from employers during the school holidays. Work continues to prioritise leavers in the weekly work allocation.

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 2024			June 2024			July 2024				
To process and pay a refund	40 working days from the date of request	41	100%	2	21	100%	1	21	100%	2		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	4	75%	5	2	100%	2	2	100%	5		
Notify the amount of retirement benefits	20 working days from date of retirement	52	100%	1	48	100%	1	52	100%	100%		
Provide a retirement quotation on request	15 working days from date of request	68	98.53%	3	63	100%	2	72	98.61%	3		One case missed target – delay obtaining information from AVC provider.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	28	100%	2	36	100%	2	24	95.83%	19		One case missed target in July 2024. Complex case, difficulty getting information from NOK. However the reply due was not set at all so waiting periods were not recorded properly.

Case levels



Member self-service

		Increase from previous Q
Total Scheme members registered	6945 (26.38%)	↑
Number scheme members who accessed annual benefit statement in Q1 2024/25	952	↑
Breakdown by member status		
• Actives	32.27%	↑
• Deferred	23.58%	↑
• Pensioners & Dependents	23.56%	↑