

Croydon Pensions Admin Team Performance Report

January 2021

Contents

- Reference Key Table 3
- Legal Deadlines 4
- Team Performance Targets 7
- Team Performance Targets 8
- Case levels 9
- Outstanding Cases by Type..... 9
- Member self-service 10

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
		November 2020		December 2020		January 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	152	61.18%	127	90.55%	156	89.10%		
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)	26	15.38%	11	27.27%	14	7.14%		Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this backlog, which is currently in the mobilisation phase.
Inform a scheme member of their calculated benefits (refund or deferred) – new cases	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	33	81.82%	30	83.33%	16	68.75%		

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
		November 2020		December 2020		January 2021			
To process and pay a refund	Two months from the date of request	12	100%	14	100%	10	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	7	85.71%	5	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	31	100%	38	100%	45	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	47	100%	62	100%	196	100%	➡	There has been an extraordinary increase in demand due to Croydon Council severance scheme.

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
		November 2020		December 2020		January 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)	33	100%	28	100%	41	97.56%	↓	
Provide all active and deferred members with annual benefit statements each year	By 31 st August	16690							An ABS has been issued for all members who were due to receive one

Team Performance Targets

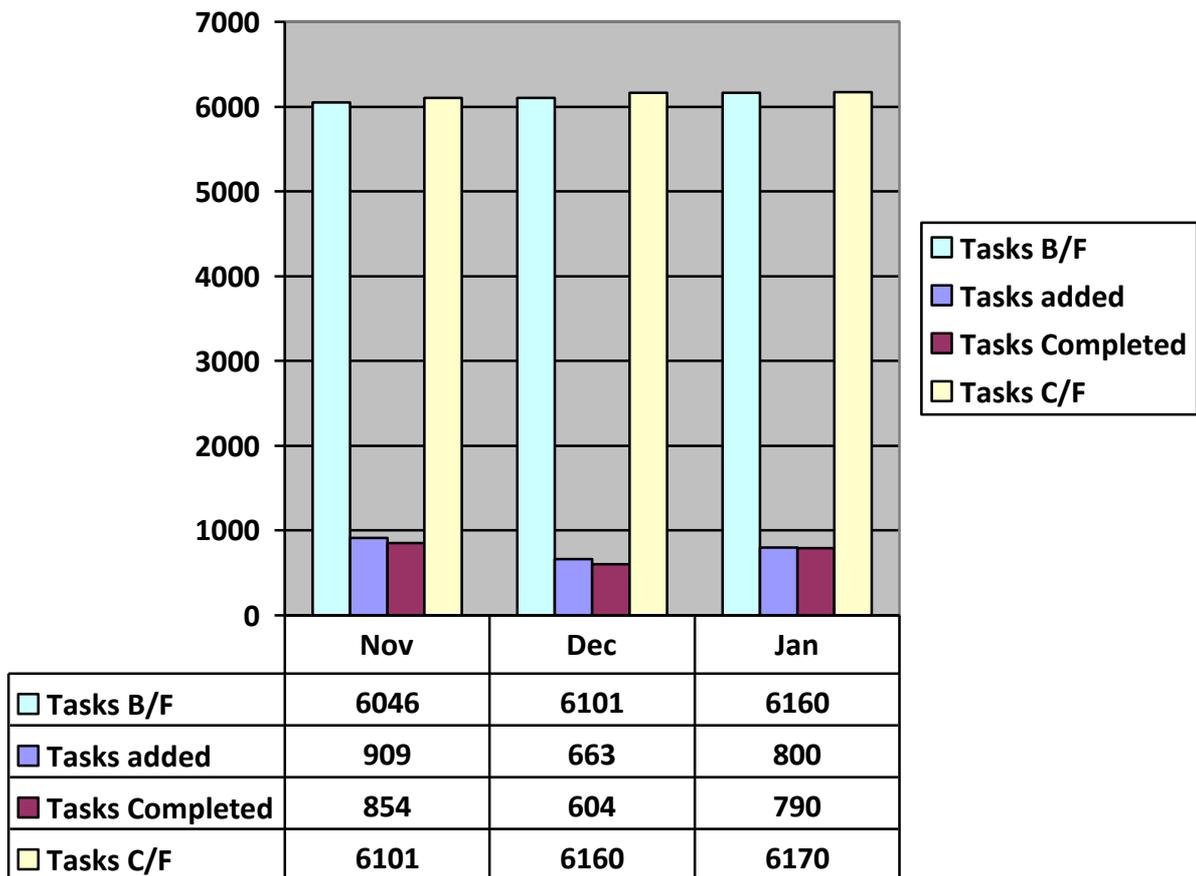
Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		November 2020			December 2020			January 2021				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	152	49.34%	46	127	87.40%	15	156	89.10%	16	↑	
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)	26	15.38%	523	11	27.27%	737	14	7.14%	663	↓	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this backlog, which is currently in the mobilisation phase.
Inform a scheme member of their calculated benefits (refund or deferred) – new cases	40 working days from date of notification (from employer or scheme member)	33	72.73%	44	30	66.67%	32	16	68.75%	43	↑	
To process and pay a refund	40 working days from the date of request	12	100%	5	14	100%	3	10	100%	2	→	
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	7	71.43%	23	5	100%	9	3	66.67%	3	↓	Lockdown resulted in delays in requesting quotes as there was less office presence to undertake printing required.

Page 7

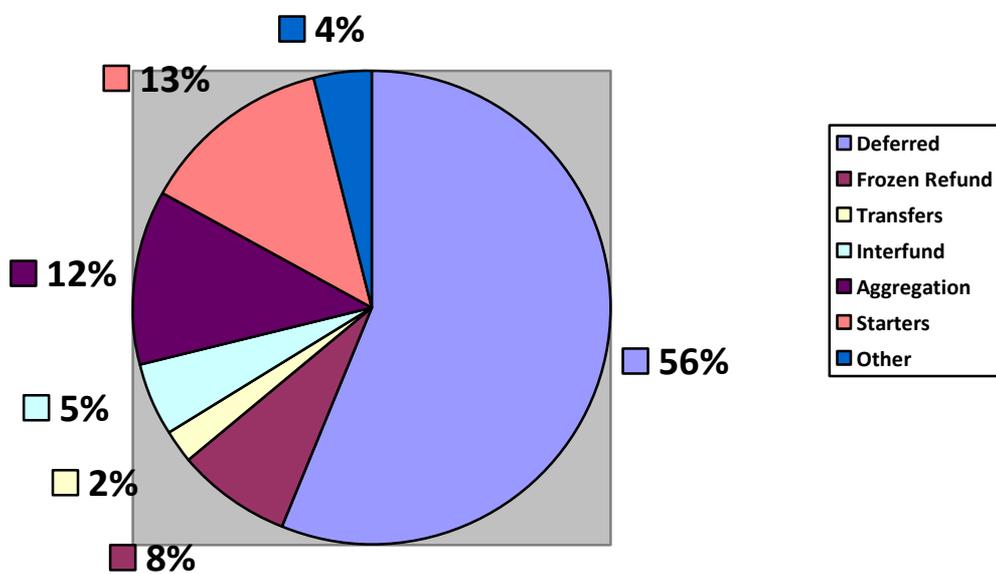
Team Performance Targets

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
		November 2020			December 2020			January 2021				
Notify the amount of retirement benefits	20 working days from date of retirement	31	100%	3	38	100%	3	45	100%	2		
Provide a retirement quotation on request	15 working days from date of request	47	93.62%	7	62	96.61%	4	196	100%	5		There has been an extraordinary increase in demand due to Croydon Council severance scheme
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	33	93.94%	8	28	100%	6	41	97.56%	6		Small number of cases not processed in deadline as further information was needed

Case levels



Outstanding Cases by Type



Member self-service

Scheme members registered	4637 (27%)
Number scheme members who accessed annual benefit statement Q3 Oct 2020 – Dec 2020.	447