









Croydon Pensions Admin Team

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
		June 2020		July 2020		August 2020			
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	291	71.13%	28	100%	6	100%	↗	Large number of new starters were identified as part of year end process which impacted on June performance due to increased volume.
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)	58	29.31%	81	58.02%	26	15.38%	↓	Historical backlog is impacting performance. Steps are being taken to engage additional resources to address the backlog
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)	42	80.95%	48	95.83%	37	64.86%	↓	

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
		June 2020		July 2020		August 2020			
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	10	100%	7	100%	15	66.67%	↓	
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	25	100%	27	100%	33	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	30	90%	58	98.28%	54	100%	↑	There has been an increase in demand in July/August due to the staffing reduction consultation

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
		June 2020		July 2020		August 2020			
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)	25	100%	24	100%	16	100%	→	
Provide all active and deferred members with annual benefit statements each year	By 31 st August	n/a	n/a	n/a	n/a	16300	97.84%		Work in underway to go back to employers to confirm missing information required to be able to run annual benefit statement or process as leaver.

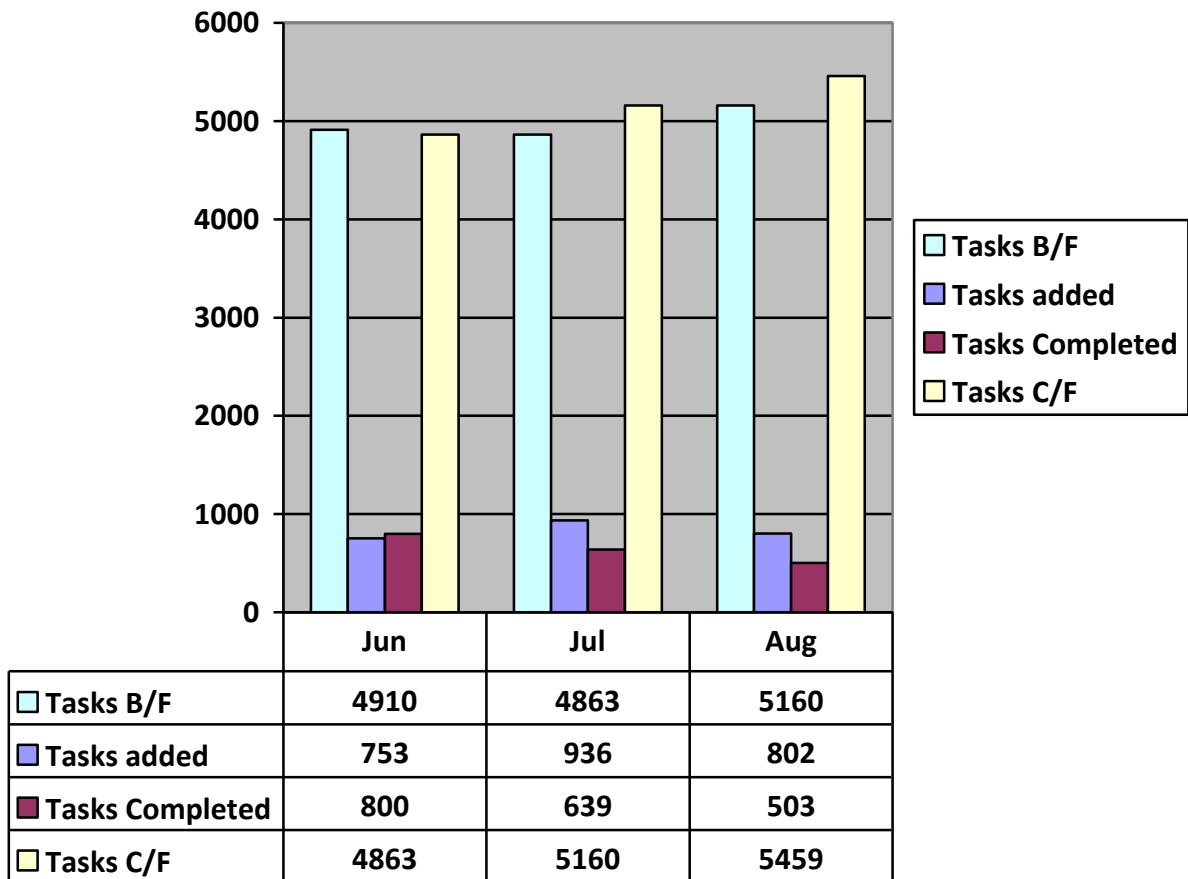
Team Performance Targets

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
		June 2020			July 2020			August 2020				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	291	62.23%	48	28	96.43%	3	6	66.67%	13	↓	Large number of new starters were identified as part of year end process which impacted on June performance due to increased volume.
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)	58	25.86%	502	81	18.52%	308	26	11.54%	891	↓	Historical backlog is impacting performance. Steps are being taken to engage additional resources to address the backlog
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)	42	71.43%	36	48	95.83%	15	37	62.16%	50	↓	
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	10	100%	15	7	100%	16	15	66.67%	42	↓	

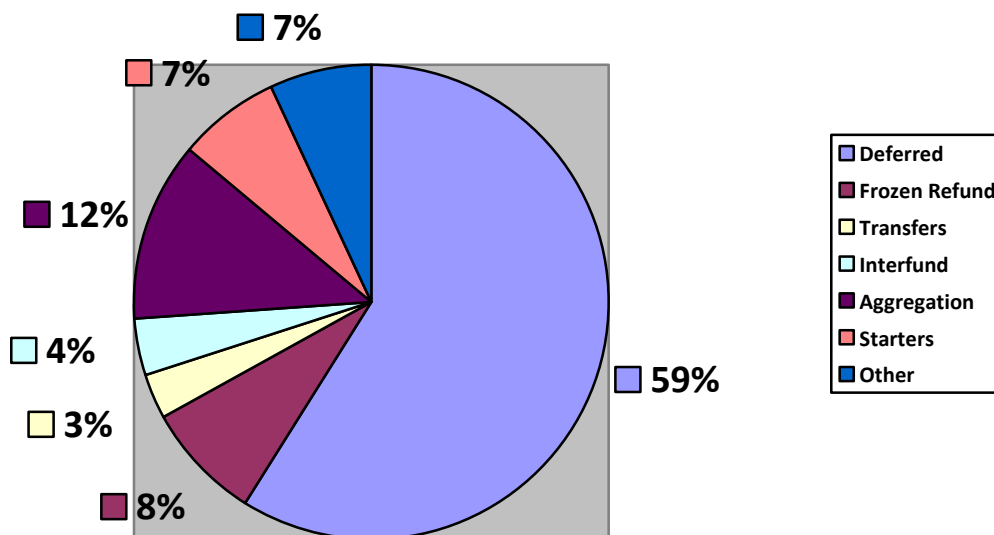
Team Performance Targets

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
		June 2020			July 2020							
Notify the amount of retirement benefits	20 working days from date of retirement	25	100%	3	27	100%	5	33	100%	3	→	
Provide a retirement quotation on request	15 working days from date of request	30	86.67%	30	58	98.28%	9	54	100%	3	↑	There has been an increase in demand in July/August due to the staffing review consultation
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	25	96%	7	24	95.83%	9	16	93.75%	7	↓	

Case levels



Outstanding Cases by Type



Member self-service

Scheme members registered	4124 (25%)
Number scheme members who accessed annual benefit statement Q1 Apr - Jun 2020.	392