









Croydon Pensions Admin Team Performance Report

November 2020




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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
		September 2020		October 2020		November 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	10	80%	68	70.59%	152	61.18%		A large number of cases setup as part of year end process were cleared during November.
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)	20	35%	22	22.73%	26	15.38%		Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this 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)	41	85.37%	46	86.96%	33	81.82%		

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
		September 2020		October 2020		November 2020			
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	10	100%	3	100%	7	85.71%		Lockdown resulted in delays in requesting quotes as there was less office presence to undertake printing required.
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	34	100%	50	100%	31	100%		There has been an increase in demand due to Croydon Council staffing review.
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	67	100%	59	100%	47	100%		There has been an increase in demand due to Croydon Council staffing review.




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
		September 2020		October 2020		November 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)	21	100%	27	96.30%	33	100%		
Provide all active and deferred members with annual benefit statements each year	By 31 st August	16690	98.69%						Work was been undertaken to confirm with employers that those who did not receive an annual are leavers who will now be processed and advised of their deferred benefits.

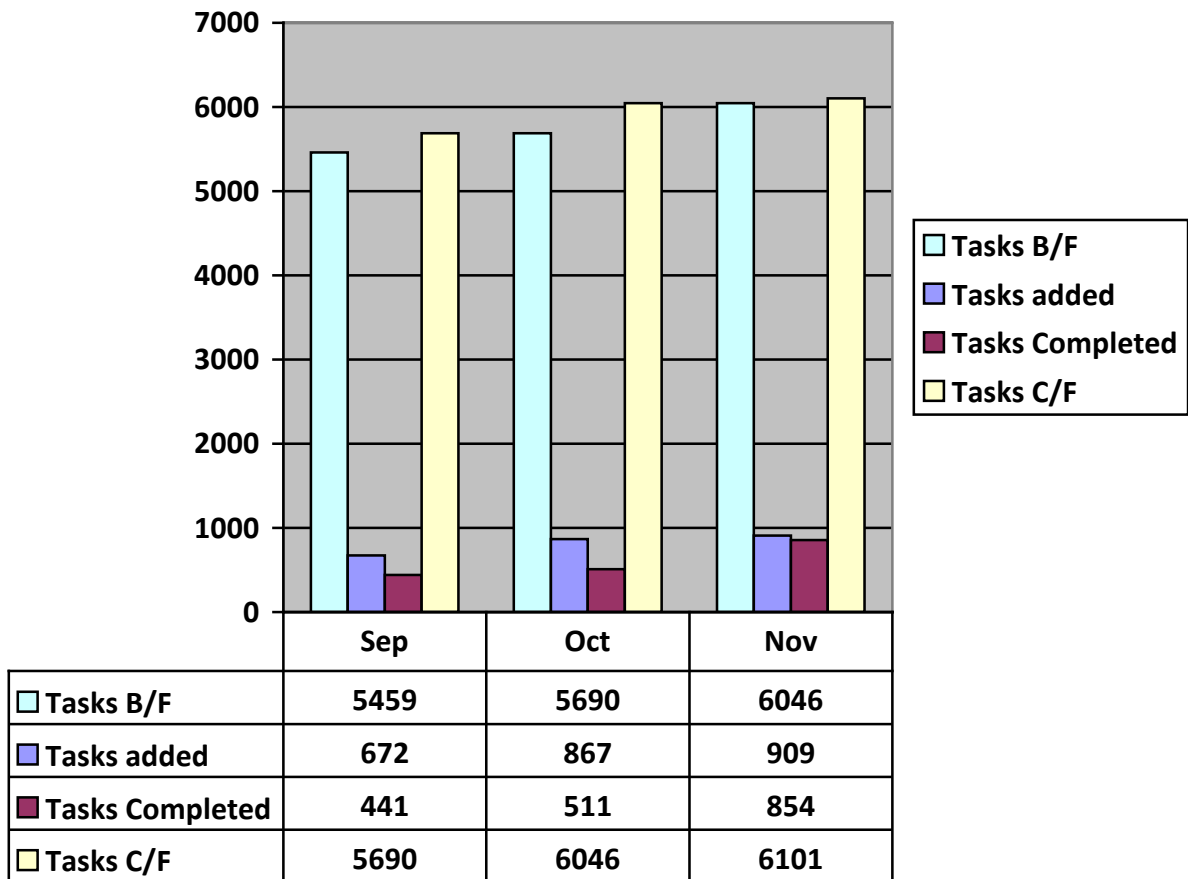
Team Performance Targets

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
		September 2020			October 2020			November 2020				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	10	80%	21	68	63.24%	28	152	49.34%	46	↓	A large number of cases setup as part of year end process were cleared during November.
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)	20	30%	365	22	22.73%	710	26	15.38%	523	↓	Historical backlog is impacting performance. Contract has now been awarded to Hymans Robertson to provide administration services to clear this 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)	41	56.10%	41	46	63.04%	36	33	72.73%	44	↑	
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	10	100%	7	3	100%	9	7	71.43%	23	↓	Lockdown resulted in delays in requesting quotes as there was less office presence to undertake printing required.

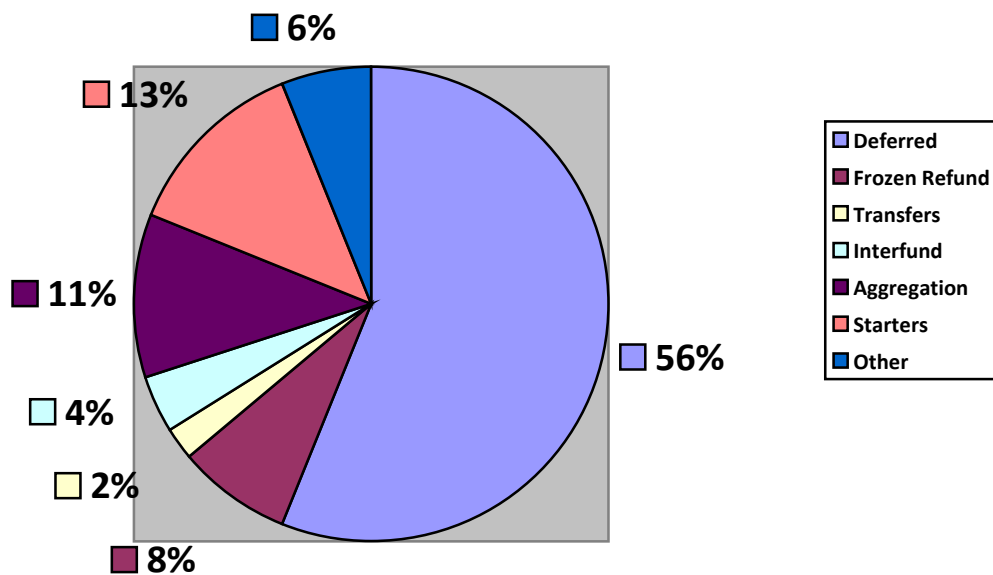
Team Performance Targets

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
		September 2020			October 2020			November 2020				
Notify the amount of retirement benefits	20 working days from date of retirement	34	100%	2	50	100%	3	31	100%	3		
Provide a retirement quotation on request	15 working days from date of request	67	95.52%	5	59	93.22%	6	47	93.62%	7		There has been an increase in demand due to Croydon Council staffing review.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	21	95.24%	7	27	92.59%	8	33	93.94%	8		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	4476 (26%)
Number scheme members who accessed annual benefit statement Q2 Jun – Sep 2020.	1006