









Croydon Pensions Admin Team Performance Report

January 2021




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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 |
|---|---|------------------------|------------------------------|------------------------|------------------------------|------------------------|------------------------------|---|--|
| | | 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

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|---|---|------------------------|------------------------------|------------------------|------------------------------|------------------------|------------------------------|---------------------|--|
| | | 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 |

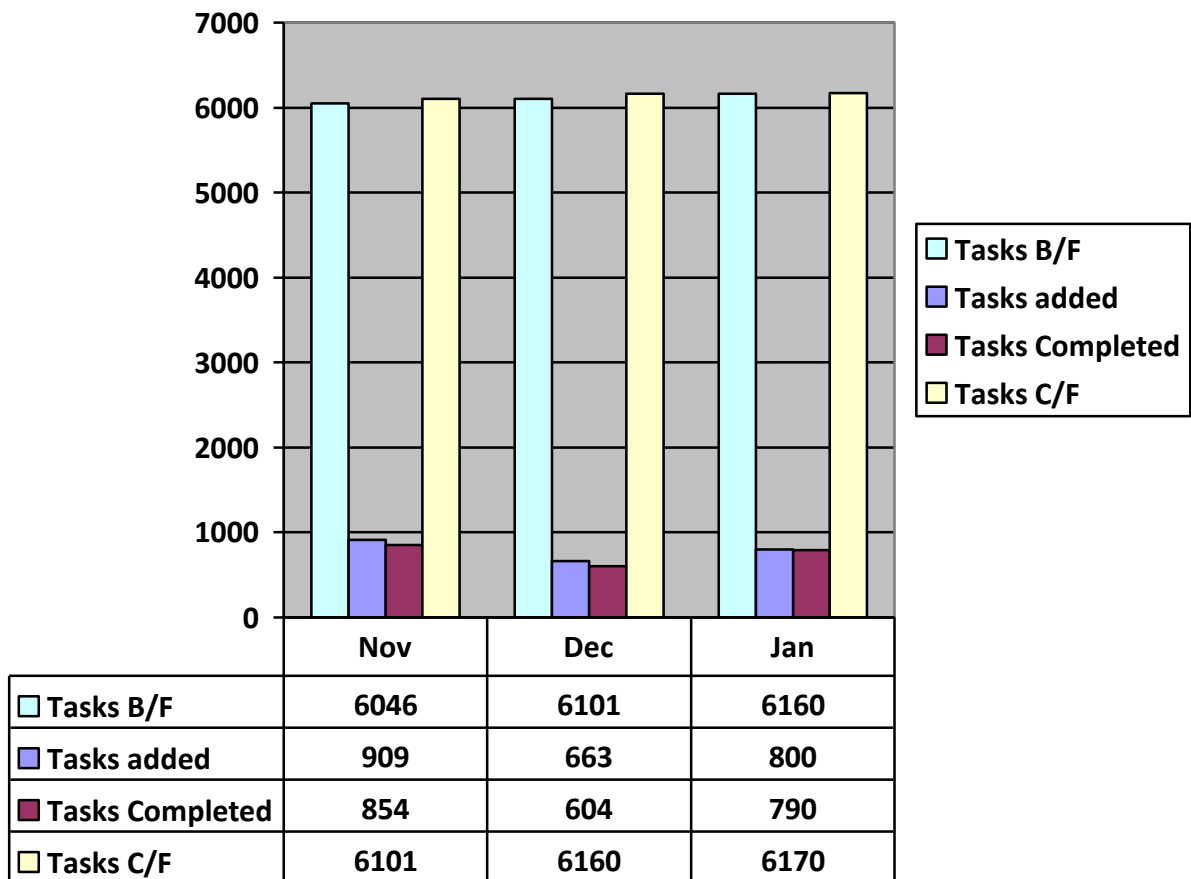
Team Performance Targets

| 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 | | | | |
| | | 152 | 49.34% | 46 | 127 | 87.40% | 15 | 156 | 89.10% | 16 | | |
| Send a notification of joining the LGPS to a scheme member | 30 days from date of notification of joining member | | | | | | | | | |  | |
| 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. |

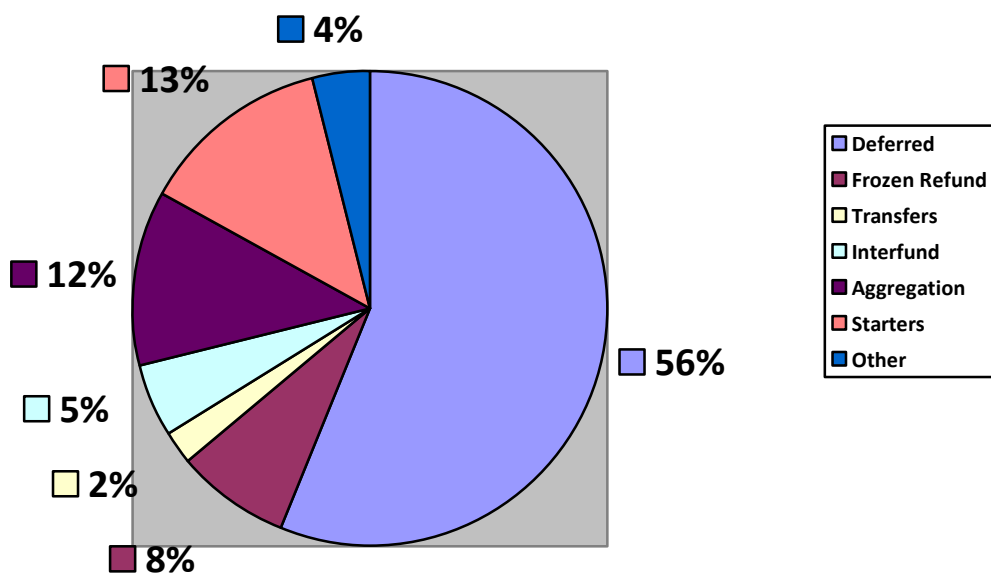
Team Performance Targets

| 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 |