









Croydon Pensions Admin Team Performance Report

May 2022



Contents

- Reference Key Table.....3
- Legal Deadlines.....4
- Team Performance Targets7
- Case levels.....9
- Outstanding Cases by Type.....10
- Member self-service10





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
		February 2022		March 2022		April 2022			
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	42	98%	116	97%	424	97%		<p>Following auto enrolment and some reporting issues the team were unable to complete all starters within the legal deadline.</p> <p>We have also seen an increase in new starter cases being identified by the end of year process (EOY).</p> <p>Resources within the team were diverted to assist with clearing the new starter cases. An above average number of starter cases were complete in April with only 14 missing the legal deadline.</p>
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)	130	17%	191	20%	260	15%		<p>Historical backlog has now been passed to Hymans Robertson for processing. As old cases are processed this will impact on performance against target. Until the backlog is cleared 100% performance against this deadline will not be met.</p>






Legal	Total	%	Total	%	Total	%
-------	-------	---	-------	---	-------	---

Process	Requirement	Number Completed	Achieved in legal deadline	Number Completed	Achieved in legal deadline	Number Completed	Achieved in legal deadline	Direction of Travel	Comments
		February 2022		March 2022		April 2022			
To process and pay a refund	Two months from the date of request	12	100%	8	100%	8	100%		
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	5	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	43	100%	30	100%	48	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	48	100%	58	100%	66	98%		One cases missed the legal deadline due to an outstanding combine case that needed to be resolved first.

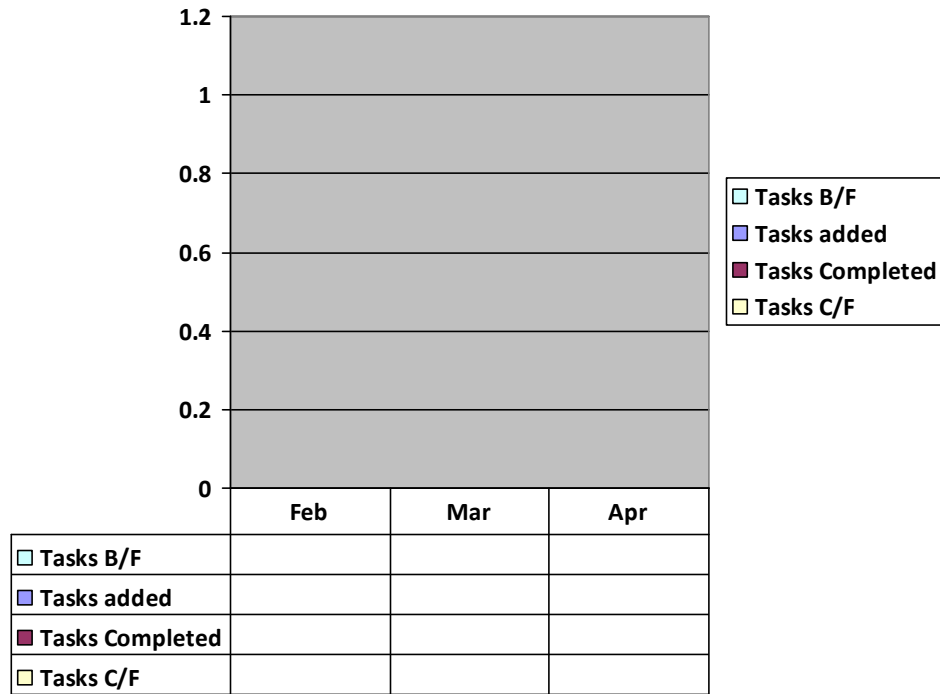
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		February 2022		March 2022		April 2022			
Calculate and notify (dependent(s) of amount of 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)	36	100%	13	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
		February 2022			March 2022			April 2022				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	42	86%	23	116	60%	26	424	53%	30		<p>Following auto enrolment and some payroll reporting issues the team were unable to complete all starters within the legal deadline.</p> <p>We have also seen an increase in new starter cases being identified by the end of year process (EOY).</p> <p>Resources within the team were diverted to assist with clearing the new starter cases. An above average number of starter cases were complete in April.</p>
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	130	14%	756	191	17%	873	260	11%	802		<p>Historical backlog has now been passed to Hymans Robertson for processing. As old cases are processed this will impact on performance against target. Until the backlog is cleared 100% performance against target will not be met.</p>

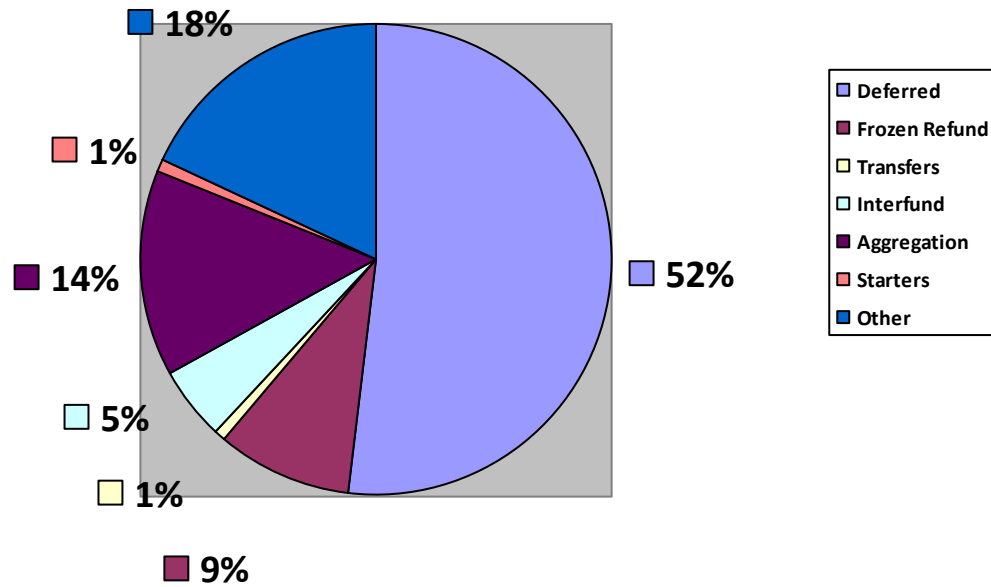
Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		February 2022			March 2022			April 2022				
To process and pay a refund	40 working days from the date of request	12	100%	3	8	100%	26	8	100%	4		
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	5	80%	11	2	100%	1	2	50%	18		One case missed the target. This was due to a delay in being allocated due to staff absences in March.
Notify the amount of retirement benefits	20 working days from date of retirement	43	100%	2	30	100%	3	48	100%	3		
Provide a retirement quotation on request	15 working days from date of request	48	100%	4	58	97%	5	66	95%	6		Two cases in March and three cases in April missed target. We hope to improve on this once our new pension officer is fully trained on estimates.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	36	97%	5	13	100%	6	TBC	TBC	TBC		One case missed target in February. The report for April has had to be rerun, figures not to be updated asap.

Case levels



% outstanding tasks relate to historic backlog of deferred benefit cases

Outstanding Cases by Type



Member self-service

Scheme members registered	5222 (29%)
Number scheme members who accessed annual benefit statement Q2 Jun 2021 – Sep 2021	1065

Contributions Monitoring Report	
Contributions reconciled to schedules	% completed
Oct 21 to Mar 22	98.55