

# **Croydon Pensions Admin Team Performance Report**

September 2022

# Contents

- Reference Key Table.....3
- Legal Deadlines.....4
- Team Performance Targets .....7
- Case levels.....10
- Outstanding Cases by Type.....11
- Member self-service .....11

# 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
		May 2022		June 2022		July 2022			
<b>Send a notification of joining the LGPS to a scheme member</b>	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	138	97%	54	81%	58	88%		
<b>Inform a scheme member of their calculated benefits (refund or deferred)</b>	As soon as practicable and no more than two months from the date of notification (from employer or scheme member)	118	34%	303	16%	474	16%		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.

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
		May 2022		June 2022		July 2022			
<b>To process and pay a refund</b>	Two months from the date of request	16	100%	22	100%	32	100%		
<b>Obtain transfer details for transfer in, calculate and provide quotation to member</b>	Two months from the date of request	0	N/A	1	100%	1	100%		
<b>Notify the amount of retirement benefits</b>	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	52	100%	39	100%	39	100%		
<b>Provide a retirement quotation on request</b>	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	80	100%	61	100%	75	100%		

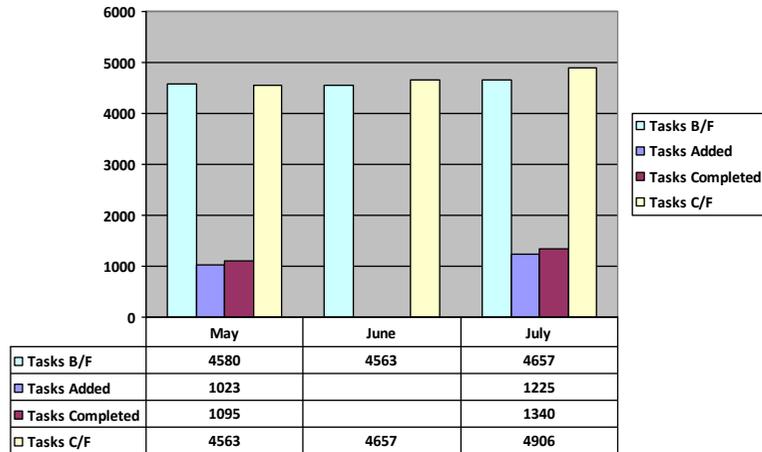
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		May 2022		June 2022		July 2022			
<b>Calculate and notify (dependent(s) of amount of death benefits</b>	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)	34	100%	20	100%	17	100%		
<b>Provide all active and deferred members with annual benefit statements each year</b>	By 31 <sup>st</sup> 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
		May 2022			June 2022			July 2022				
<b>Send a notification of joining the LGPS to a scheme member</b>	30 days from date of notification of joining member	138	66%	22	54	69%	28	58	88%	27		
<b>Inform a scheme member of their calculated benefits (refund or deferred)</b>	40 working days from date of notification (from employer or scheme member)	118	29%	591	303	15%	893	474	15%	914		<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> <p>The Pension Committee have requested a breakdown between backlog and current cases. It has not proved possible to separate these cases however a more detailed breakdown of cases completed by Hymans is shown at the end of this report.</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
		May 2022			June 2022			July 2022				
<b>To process and pay a refund</b>	40 working days from the date of request	16	100%	2	22	100%	5	32	100%	2		
<b>Obtain transfer details for transfer in, calculate and provide quotation to member</b>	40 working days from the date of request	0	N/A	N/A	1	100%	1	1	100%	1		
<b>Notify the amount of retirement benefits</b>	20 working days from date of retirement	52	100%	1	39	100%	2	39	100%	2		
<b>Provide a retirement quotation on request</b>	15 working days from date of request	80	99%	4	61	98%	2	75	99%	3		One case each month did not meet target.
<b>Calculate and notify (dependent(s) of amount of death benefits</b>	20 working days from receipt of all information	34	100%	4	20	100%	5	17	100%	3		

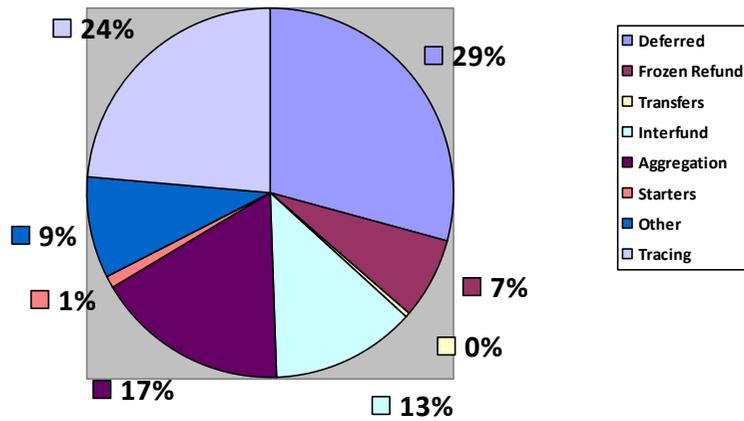
## Case levels – excluding backlog cases



More tasks are being created automatically as part of the i-Connect system. These tasks are not included in the standard outstanding case reports. We are now using two separate reports to capture both tasks and cases to accurately reflect the workload situation.

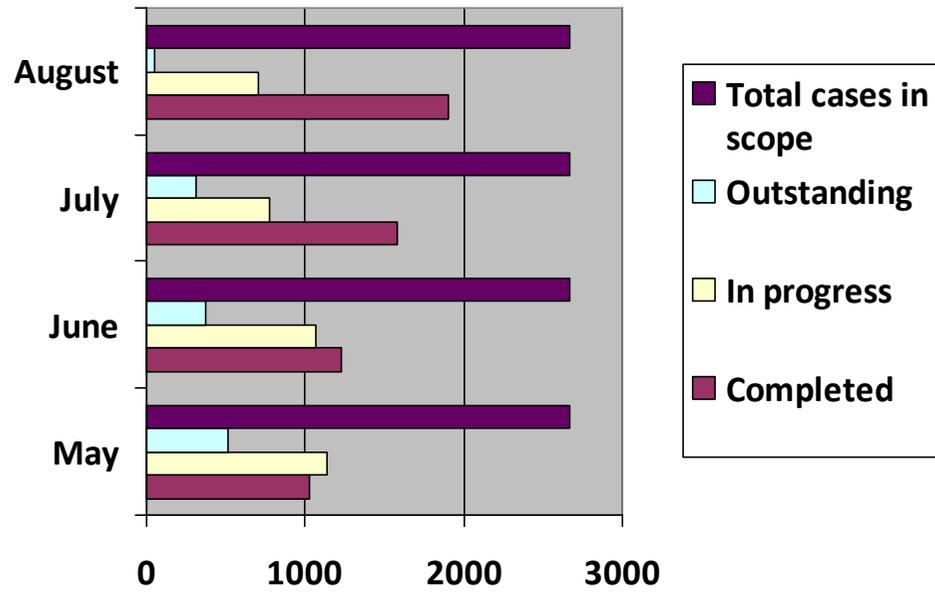
The above table does not include cases being completed as part of the backlog project. These have been separated out and reported on a separate table below.

## Outstanding Cases by Type



Additional case types have been added to provide further details. Tracings case are those where the calculations have been completed and checked but we need to use a tracing service to confirm the individuals current address. The bulk of these relate to completed backlog cases. Figures taken from July 2022

## Backlog cases levels



### Contributions Monitoring

Contributions reconciled to schedules	% Completed
April 2022 to June 2022	97.57

