

Croydon Council

REPORT TO:	Pension Board 13 October 2022
SUBJECT:	Croydon Pensions Administration Team Key Performance Indicators for the Period From June 2022 to August 2022
LEAD OFFICER:	Matthew Hallett - Acting Head of Pensions and Treasury

1. **RECOMMENDATION**

The Committee is asked to:

- 1.1 Note the Key Performance Indicators and the performance against these indicators set out in Appendix A to this report.

2. **EXECUTIVE SUMMARY**

- 2.1 This report sets out Key Performance Indicators for the administration of the Local Government Pension Scheme for the three-month period up to the end of August 2022

3. **DETAIL**

- 3.1 Good governance suggests that the performance of the administration of the Local Government Pension Scheme should be monitored. This report has been developed using the guidance published by CIPFA (Administration in the LGPS: A Guide for Pension Authorities) and is reporting to the committee on the LGPS administration performance for the period June 2022 to August 2022. The indicators cover legal deadlines; team performance targets, case levels, take up of the member self-service and the indicators and performance against these are details more fully in Appendix A to this report.

4. **COMMENTARY**

- 4.1 The team continue to perform well on life event cases such deaths and retirements.
- 4.2 Annual benefits statements were published online within the statutory timeframe, by 31 August. Annual benefit statements were produced for 100% of active members and 86.19% of deferred members giving a total of 92.30%. An analysis of the deferred statements not produced indicated the majority related to outstanding leaver calculations, which have been identified as part of the backlog project contracted to a third party. Work on this project continues and members are being contacted once the calculations have been completed. The remainder relate to leavers where we are awaiting transfer details from other LGPS funds before the deferred benefits can be processed or those that have left the scheme post 31 March 2022 and we await leaver information from employers. These cases are included in BAU work and handled by the Pension Administration Team as part of the daily workflow. Members will be contacted once the

calculations have been completed.

- 4.3 Work on the backlog project is in the final stages. As at the 31 August 2022 there remain 758 outstanding tasks assigned to the backlog project. Of these 708 are in the process of being calculated or checked.
- 4.4 Scheme employers were contacted in February and March 2022 regarding end of year returns the deadline for submission. The response from employers was positive with 34 received by the deadline a further 9 were received in May. The quality of returns was generally good but it highlighted that some of the larger employers were not notifying the administration team of members starting and leaving promptly. A communication will be sent to employers reminding them of their responsibility in this regard.
- 4.5 We have agreed a plan to trace former leavers identified as part of the backlog project. This will commence in October following completion of the annual allowance calculations. As at the 31 August 2022 tracing tasks equated to just over 27% of our case load. We will be able to complete hundreds of DBTRACE tasks as a result, as well as increasing Member Self-Service uptake.
- 4.6 We have onboarded three more payroll providers to full I-Connect, this encompasses six employers in total. There are still issues with the Oracle I-connect files which has required the Technical Team to spend time sorting out the Oracle end of year information.
- 4.7 We have met with our software provider to discuss the Data Dashboard solution and ways to improve the quality of data matching criteria in readiness for the implementation of Data Dashboard requirements.
- 4.8 The Data Quality scores for The Pensions Regulator were run in late August and we anticipate the results in early October.
- 4.9 We are currently working on the Annual Allowance calculations for over 9000 active members. We are required to provide Pension Saving Statements by 6 October 2022.
- 4.10 Cyber Security
- 4.11 We completed the Aon Cyber Scorecard based on available information gathered from different Council departments and external advisers. In some cases the information was not available.
- 4.12 The results were as expected and show that we are at the beginning of the process in most areas.
- 4.13 A mapping exercise will be undertaken to clearly identify how data moves and where any potential risks are. We anticipate starting this project later in the autumn.
- 4.14 McCloud
- 4.15 Final reports are expected from the Council's HR data team week commencing the 10 October. Comparisons and updates can then commence for Croydon Council for the period April 2014 to March 2022. This represents the bulk of the membership and data to be checked.
- 4.16 Analysis has been carried out on the data reports taken from the pension administration system to narrow down the checks required. This exercise has removed approximately 15% of the data lines required to be checked.
- 4.17 Final checks are currently being made to data due to be issued to employers.

5. CONSULTATION

- 5.1 Officers have previously consulted with both the Pension Committee and Local Pension Board in the template for the key performance indicator report which forms the basis of Appendix A

6. DATA PROTECTION IMPLICATIONS

- 6.1 Will the subject of the report involve the processing of 'personal data'?

No.

Has a data protection impact assessment (DPIA) been completed?

No. This report relates to matters relating to the administration of the LGPS and the Croydon Pension Fund.

Approved by: Matthew Hallett on behalf of Jane West, Corporate Director of Resources (Section 151 Officer)

CONTACT OFFICER:

Matthew Hallett - Acting Head of Pensions and Treasury

BACKGROUND DOCUMENTS:

None.

APPENDIX

Appendix A: Croydon Pensions Admin Team Performance Report, June 2022 to August 2022