Croydon Pensions Admin Team
Performance Report

October 2022

Contents

Reference Key Table

Direction of travel reference table	
⬆ (green)	100% achieved against target performance improved
➡ (green)	100% achieved on target and performance static
⬆ (yellow)	>90% achieved against target and performance improved
➡ (yellow)	>90% achieved against target and performance static
⬇ (yellow)	>90% achieved against target and performance declined
⬆ (red)	<90% achieved against target and performance improved
➡ (red)	<90% achieved against target and performance static
⬇ (red)	<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
		June 2022		July 2022		August 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	54	81%	58	88%	176	100%	⬆	New starter cases increase at this time of year as a result of the end of year processes. New starters that employers have failed to inform us of through out the year are identified.
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)	303	16%	474	16%	428	18%	⬆	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
		June 2022		July 2022		August 2022			
To process and pay a refund	Two months from the date of request	22	100%	32	100%	13	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	1	100%	1	100%	5	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	39	100%	39	100%	43	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	61	100%	75	100%	91	100%	➡	We have seen an increase in the number of estimate requests.

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
		June 2022		July 2022		August 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)	20	100%	17	100%	22	100%	➡	
Provide all active and deferred members with annual benefit statements each year	By 31st 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
		June 2022			July 2022			August 2022				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	54	69%	28	58	88%	27	176	99%	1	⬆️	New starters that employers have not informed us about are being identified as part of the end of year process. The extra resources diverted to processing new starters has vastly improved KPIs in this area.
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	303	15%	893	474	15%	914	428	18%	866	⬆️	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. The Pension Committee have requested a breakdown between backlog and current cases. It has not been possible to seaparte the current and historic cases in the reporting without signifigant changes ot the report. As the backlog project is due to end in Sept/Oct a deciosn has been made to keep the KPI reporting as one

												and add additional infomration on the backlog in the tables below.

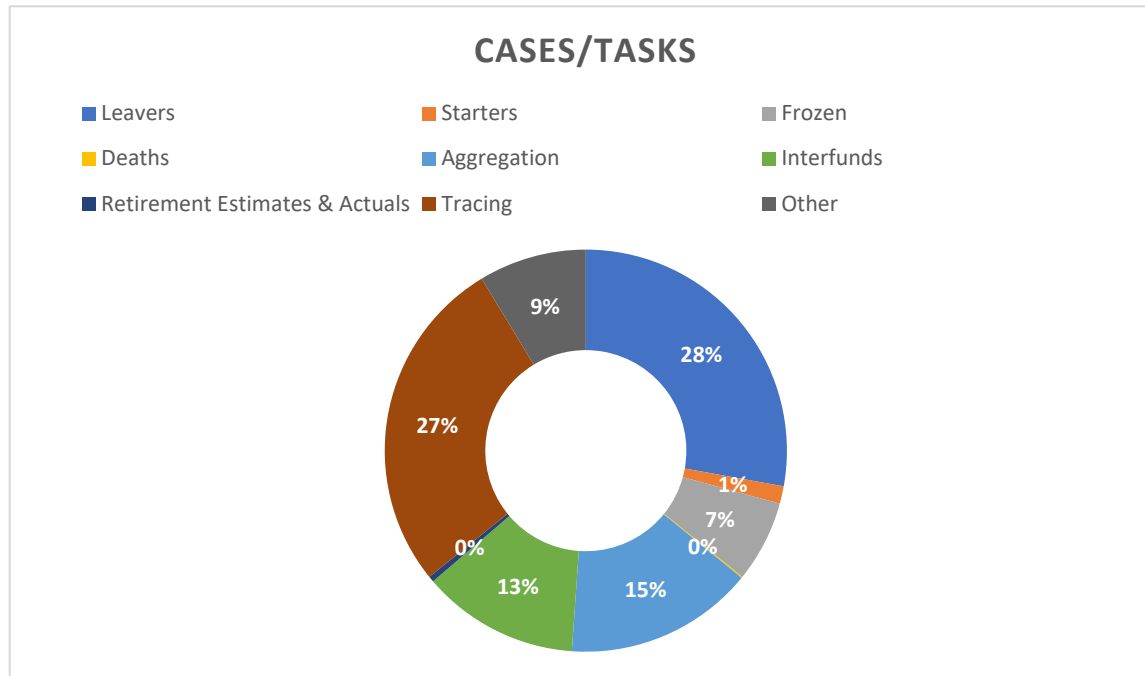| Process	Team Target	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Total Number Completed	% Achieved against target	Average days to process	Direction of Travel	Comments
		June 2022			July 2022			August 2022				
To process and pay a refund	40 working days from the date of request	22	100%	5	32	100%	2	13	100%	1	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	1	100%	0	1	100%	1	5	100%	1	➡	
Notify the amount of retirement benefits	20 working days from date of retirement	39	100%	2	39	100%	3	43	100%	2	➡	
Provide a retirement quotation on request	15 working days from date of request	61	98%	2	75	99%	3	91	100%	2	⬆	One case missed target in July.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	20	100%	5	17	100%	3	22	100%	2	➡	

Case levels
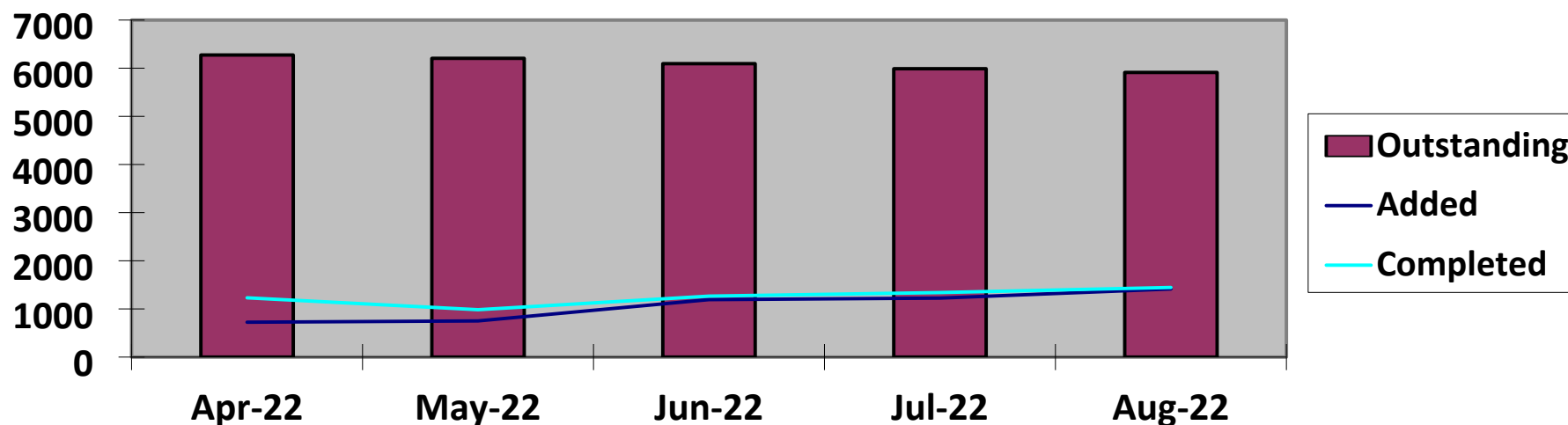
This chart details the number of cases and stand-alone tasks added and completed and the number of outstanding cases/tasks at the end of each period. The number of tasks and cases added and completed each month is also being tracked.

The figures used to compile this chart are taken from three separate reports using real time data. As a result there are some discrepancies between the reports and it has been necessary to remove the number of cases/tasks brought forward each month. The team is working to resolve these issues.

The majority of stand-alone tasks are generated automatically by the iConnect system and do not always result in a calculation case being created. The iConnect tasks are assessed by the Technical Team and appropriate action is taken. Although a task may not result in a calculation we have included them in the figures to show the volume of work processed by the team.

A stand-alone tracing task is setup once a backlog deferred case has been completed. Resources have been allocated to trace these members in October 2022. The number of tracing tasks amounts to 27.14% of outstanding cases/tasks as at 31 August 2022.

Breakdown of case/task type

CASES/TASKS

Legend:
- Leavers
- Starters
- Frozen
- Deaths
- Aggregation
- Interfunds
- Retirement Estimates & Actuals
- Tracing
- Other

Pie chart values: 28%, 1%, 7%, 0%, 15%, 13%, 0%, 27%, 9%

Member self-service

Scheme members registered	6010 (22.74%)
Number scheme members who accessed annual benefit statement Q2 Apr 2022 – Jun 2022	737

Contributions Monitoring

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