Croydon Pensions Admin Team
Performance Report

January 2023

Delivering for Croydon | **CROYDON** www.croydon.gov.uk

Contents

Reference Key Table

Direction of travel reference table	
⬆ (green)	100% achieved against target performance improved
➡ (green)	100% achieved on target and performance static
⬆ (amber)	>90% achieved against target and performance improved
➡ (amber)	>90% achieved against target and performance static
⬇ (amber)	>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
		September 2022		October 2022		November 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	235	98.72%	158	97.47%	191	98.95%	⬆️	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)	666	12.31%	307	19.54%	58	79.31%	⬆️	

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
		September 2022		October 2022		November 2022			
To process and pay a refund	Two months from the date of request	15	100%	13	100%	7	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	4	100%	5	100%	1	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	93	100%	72	100%	60	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	76	97.37%	79	100%	63	100%	⬆	One member with two deferred records missed target in September. Issues with tracing member.

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
		September 2022		October 2022		November 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)	32	100%	26	100%	30	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
		September 2022			October 2022			November 2022				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	235	98.72%	6	158	97.47%	11	191	97.38%	5	⬆	
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	666	12.31%	1008	307	18.89%	963	58	79.31%	242	⬆	The backlog project has now been competed. There remain a few historic cases referredd back to Croydon to investigate further which are being dealt with by senior members of the team.

While the team are two members down we have been focusing on priority work but have completed some successful Blitz days tarheting leavers and frozen refunds and these will continue in the New Year. |

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
		September 2022			October 2022			November 2022				
To process and pay a refund	40 working days from the date of request	15	100%	4	13	100%	3	7	100%	3	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	4	100%	2	5	80%	5	2	100%	1	⬆	One case missed traget in October
Notify the amount of retirement benefits	20 working days from date of retirement	93	100%	3	72	100%	2	60	100%	2	➡	
Provide a retirement quotation on request	15 working days from date of request	76	97.37%	7	79	100%	2	63	100%	4	⬆	One member with two deferred records missed target in September. Issues with tracing member.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	32	100%	3	26	96.15%	4	30	100%	3	⬆	One case missed target in October.

Case levels
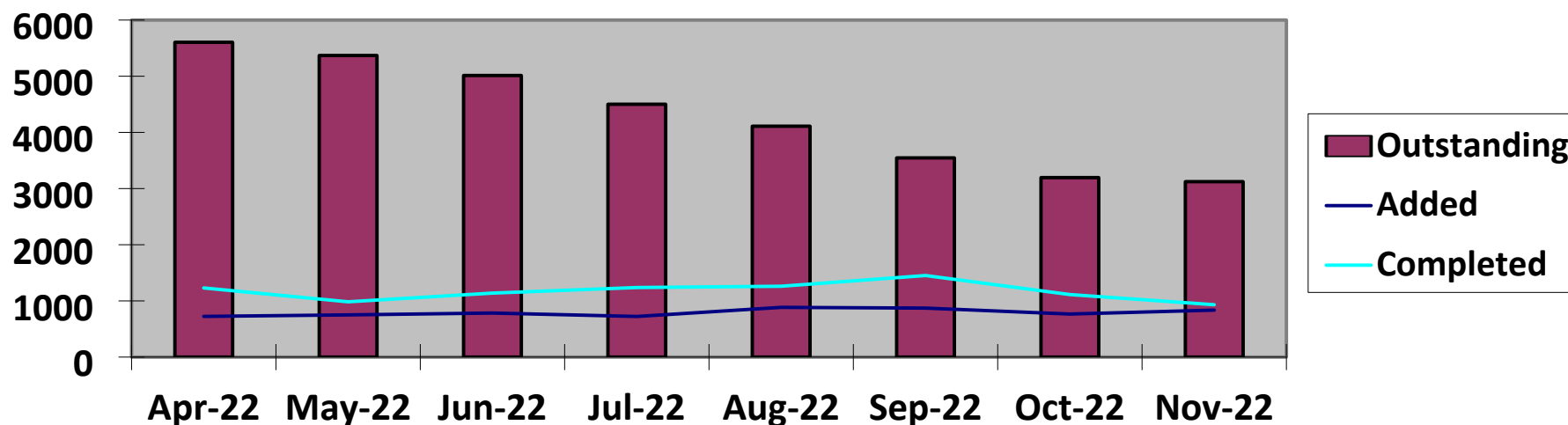
Number of outstanding cases
The Backlog Project tracing tasks have been removed as they do not represent work to be completed.

Member self-service

Total Scheme members registered	6010 (22.74%)
Number scheme members who accessed annual benefit statement Q2 Jul 2022 – Sep 2022	737
Breakdown by member status	
• Actives	30.14%
• Deferred	20.25%
• Pensioners & Dependents	17.98%