









Croydon Pensions Admin Team Performance Report

April 2024



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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
		December 2023		January 2024		February 2024			
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	209	100%	185	100%	150	100%		
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)	65	73.85%	86	80.23%	69	84.06%		Processing leaver calculations within legal and fund level timeframes remains a challenge for the team. Leaver calculations are particularly vulnerable to delays caused by interfund transfers, aggregations and TUPE transfers. Spikes in other workload areas do draw resource away from leaver calculations. We recognise the issue and leavers are forming a key part of our work plan for 2024. Leavers account for approx 50% of our workload and we need to ensure this is resources accordingly. A review of work allocation and resources has been planned for early January.

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
		December 2023		January 2024		February 2024			
To process and pay a refund	Two months from the date of request	10	100%	11	90.91%	8	100%	➡	
Obtain transfer details for transfer in, calculate and provide quotation to member	Two months from the date of request	6	100%	0	N/A	4	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	52	100%	56	100%	55	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	52	100%	78	100%	72	100%	➡	

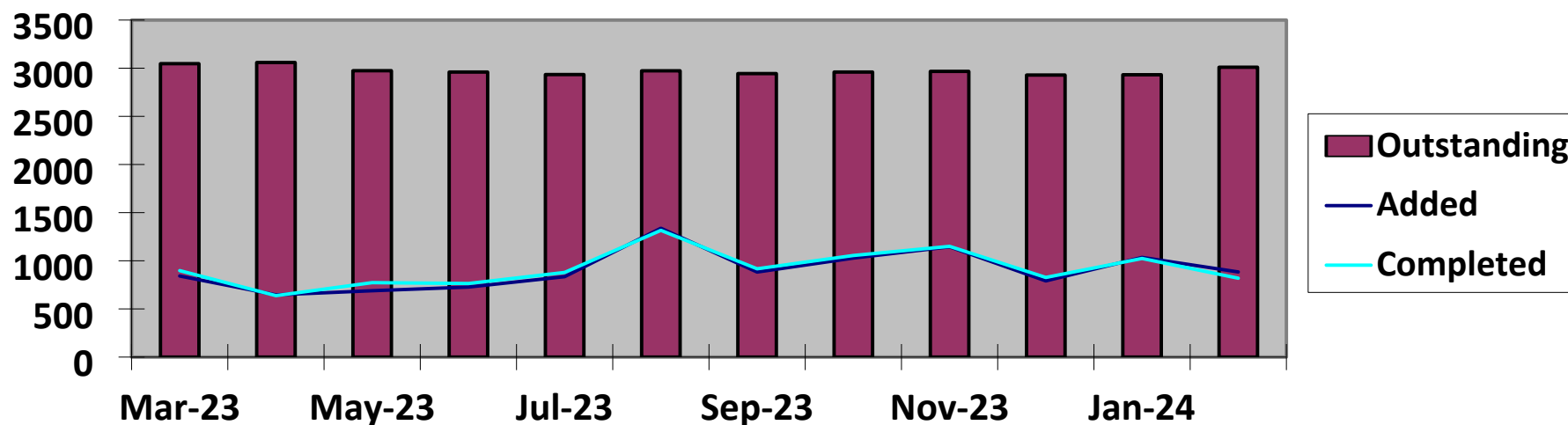
Process	Legal Requirement	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Total Number Completed	% Achieved in legal deadline	Direction of Travel	Comments
		December 2023		January 2024		February 2024			
Calculate and notify (dependent(s) of amount 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)	22	100%	32	100%	32	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
		December 2023			January 2024			February 2024				
Send a notification of joining the LGPS to a scheme member	30 days from date of notification of joining member	209	98.56%	2	185	100%	1	150	100%	1	↑	3 cases missed target in December 2023.
Inform a scheme member of their calculated benefits (refund or deferred)	40 working days from date of notification (from employer or scheme member)	65	69.23%	137	86	75.58%	47	69	84.06%	33	↑	Processing leaver calculations within legal and fund level timeframes remains a challenge for the team. Leaver calculations are particularly vulnerable to delays caused by interfund transfers, aggregations and TUPE transfers. Spikes in other workload areas do draw resource away from leaver calculations. We recognise the issue and leavers are forming a key part of our work plan for 2024. Leavers account for approx 50% of our workload and we need to ensure this is resources accordingly. A review of work allocation and resources has been planned for early January.

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
		December 2023			January 2024			February 2024				
To process and pay a refund	40 working days from the date of request	10	100%	1	11	90.91%	43	8	100%	3	↑	One case missed target in January 2024. After investigating it has been established the incorrect task type was created and not terminated properly.
Obtain transfer details for transfer in, calculate and provide quotation to member	40 working days from the date of request	6	83.33%	9	0	N/A	N/A	4	100%	2	↑	One case missed target in December 2023.
Notify the amount of retirement benefits	20 working days from date of retirement	52	100%	1	56	100%	2	55	100%	1	→	
Provide a retirement quotation on request	15 working days from date of request	52	100%	2	78	93.59%	4	72	100%	2	↑	5 cases missed target in January 2024.
Calculate and notify (dependent(s) of amount of death benefits	20 working days from receipt of all information	22	100%	2	32	96.88%	5	32	100%	2	↑	One case missed target in January 2024. This was a very complex case involving different overseas parties.

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

		Increase from previous Q
Total Scheme members registered	6608 (24.84%)	↑
Number scheme members who accessed annual benefit statement in Q3 (Oct-Dec) 2023/24	556	
Breakdown by member status		
• Actives	32.16%	↑
• Deferred	21.90%	↑
• Pensioners & Dependents	21.05%	↑