

LONDON BOROUGH OF CROYDON

REPORT:	Pension Board
DATE OF DECISION	17 October 2024
REPORT TITLE:	Croydon Pensions Administration Team Key Performance Indicators for the Period June 2024 to August 2024
CORPORATE DIRECTOR / DIRECTOR:	Jane West – Corporate Director of Resources (Section 151 Officer)
LEAD OFFICER:	Matthew Hallett – Head of Pensions and Treasury
KEY DECISION? [Insert Ref. Number if a Key Decision]	No
CONTAINS EXEMPT INFORMATION? <i>(* See guidance)</i>	No

1. SUMMARY OF REPORT

- 1.1 The report sets out the Key Performance Indicators, measured against the legal requirements for the administration of the Local Government Pension Scheme for the three-month period up to the end of August 2024.

2. RECOMMENDATIONS

- 2.1 The Board is asked to note the Key Performance Indicators and the performance against these indicators set out in Appendix A to this report.

3. REASONS FOR RECOMMENDATIONS

- 3.1 To ensure good governance of the scheme the Board should be informed of the performance of the administration of the Local Government Pension Scheme and monitor performance against legal deadlines and team performance targets. This report has been developed using guidance published by CIPFA (Administration in the LGPS: A Guide for Pension Authorities).

4. BACKGROUND AND DETAILS

- 4.1 This report covers the period June 2024 to August 2024 and covers legal deadlines, team performance targets, case levels and take up of the member self-service portal. The indicators and performance against these are detailed in Appendix A of this report.

- 4.2** The team have generally met targets for most indicators during this period with only a few cases missing legal and team targets for each category with the exception of deferred benefit calculations which still fall below expected levels.
- 4.3** Maintaining levels of leaver calculations can be challenging during the summer period when schools are on holiday and obtaining information can take longer.
- 4.4** To assist with the leaver calculations we have been focusing on outstanding interfund transfer cases that were preventing us from running the leaver calculation. For several weeks one member of the team was focused entirely on interfund cases and we saw improvement in case numbers as a result. Interfund cases form part of daily BAU work but we will look to continue targeted periods of intense focus on case types as required.
- 4.5** The end of year processes were completed within this period with CARE and contributions posted for all employers. The number of missing CARE pay queries remains consistent with previous years. Queries will be going out to employers over the summer to clear these issues.
- 4.6** The administration team has attended several member engagement events over the summer. We attended one of our larger schools and gave a presentation to over 100 members on the LGPS and member self-service with one-to-one sessions afterwards. The event proved to be successful and the majority of attendees were able to register for member self-service on the day. We have also been invited to attend team meetings and TUPE consultation meetings within the council to talk about pensions and answer any questions.
- 4.7** We have been working with colleagues in payroll on the Oracle improvement project. This has been a valuable experience, learning how other teams use the system that impacts the data we receive. New processes have been developed as a result of this and we expect to see data quality improvements filtering through.
- 4.8** Members of the team attended several online sessions throughout the summer hosted by our software provider on automation. These sessions were very useful, we have identified a couple of areas we would like to develop once the new Engage member self-service portal has been successfully implemented. Areas to develop include automated email communications for starters and leavers.
- 4.9** User Acceptance Testing (UAT) has commenced for Engage and the team is ensuring adequate resource is available for testing. The results so far are encouraging and we anticipate the new system will be live in mid-October 2024. Staff training is being prepared to ensure the team are familiar with the new system including its enhanced functionality, so they can respond to member queries.
- 4.10** Member communications and targeted employer communications are scheduled for later in the year to allow for a soft launch to ensure any unforeseen issues are resolved.
- 4.11** Annual Benefits Statements were issued before the legal deadline for 100% of active members and 92.64% of deferred members which is an increase on previous years.

- 4.12** Member communications were issued to all active members working directly for the Council via the Internal Communication Team. Member communications were issued to all scheme employers to communicate with their staff.
- 4.13** We saw the expected increase in member queries around this time, mostly relating to member self-service registration. Extra staffing resources were made available on the pension inbox to keep up with member queries.

5. ALTERNATIVE OPTIONS CONSIDERED

- 5.1** N/A

6. CONSULTATION

- 6.1** Officers have previously consulted with both the Pension Committee and Pension Board on the template for the key performance indicators report which forms the basis of Appendix A.

7. IMPLICATIONS

- 7.1** Any implications resulting from the recommendations of this report are considered by the Pension Committee, which is the decision making body for Pension Fund matters.

8. APPENDICES

- 8.1** Appendix A: Croydon Pensions Administration Team Performance Report, June 2024 to August 2024.

9. BACKGROUND DOCUMENTS

- 9.1** There are no background documents to this report.