

LPP

Local Pensions Partnership
Administration



Brent Pension Fund

Quarterly Administration Report

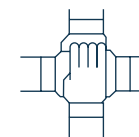
1st October – 31st December 2020

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Definitions



Working
Together

Page 6

Total Fund Membership

Total Fund Membership is the number of Member records held on the LPPA pensions administration system that are contributing to, awaiting benefits, or receiving benefits from the pension fund.

Current age demographic

The age profile of the Membership is split across three types of status:

Active Members – Members who are currently contributing toward their pension benefits.

Deferred Members – Members who hold a deferred benefit in the fund.

Pensioner Members – Pensioners and Dependants who are currently receiving a pension.

Page 8

Casework Performance Against SLA

Performance is measured once all information is made available to LPPA, to enable them to complete the process. All casework has a target timescale in which to complete the process, and performance is measured as the % of cases that have been completed within that timescale.

Page 9 & 10

Casework Performance Against SLA

The category of 'Other' on this page covers cases including, but not exclusive to:

- Benefit revisions
- Maternity/paternity cases
- Ill Health cases
- Scheme Opt-Out cases
- Cases raised to cover 'My Pension Online' registration queries
- P60 queries
- 50/50 scheme changes
- APC / AVC queries

Please note the number of cases brought forward, does not match the corresponding number of outstanding cases reported in the previous quarter (due to reasons including the deletion of cases during the current reporting period).

Page 11, 12 & 13

Elapsed Times

Elapsed days represent the total number of working days between the case being set up, and when it was completed by LPPA.

Page 14

Helpdesk Performance

Average wait time measures the time taken from the caller being placed into the queue, to them speaking with a Helpdesk adviser.

The percentage of calls answered does not include calls that are abandoned by the caller where the wait time is less than 2 minutes. From July 2020, the average wait time is Client specific (prior to this, it was measured for All Clients).

Page 17 & 18

Customer Satisfaction Scores

The Helpdesk satisfaction scores (telephone, email and retirement) are the percentage of people who completed the survey with a satisfied (green) or neutral (amber) response. The Retirement satisfaction score illustrates the total surveys taken, split by response of Dissatisfied or Satisfied.

Page 19

My Pension Online (MPO)

The number and % of Members who have signed up to "My Pension Online" (online Member portal), including a quarterly view and a comparison with the overall LPPA sign up rate (all Members).

Page 20

My Pension Online (MPO)

The number of Members that are registered for My Pension Online, split by Member status and age profile.

Page 22 & 23

Telephone Numbers

The number and % of telephone numbers held by Member status (this is important as LPPA use telephone contact details where possible to reduce elapsed times).

Existing e-mail addresses

The number and % of emails held by Member status (this is important as LPPA utilise email as the preferred method of written communication).

E-Communications Opt-outs

The number and % of Members who have chosen not to receive email communications.

Page 27 & 28

Common/Conditional Data Fails

The Pension Regulator requires Administrators to keep Member data up to date to ensure benefits are accurately paid. This is split by Common Data (details that are specific to the Member) and Conditional Data (data that is related to the pension).

Individual Fails shows the total number of unique Members that have a single or multiple number of Common Data or Conditional Data fails. On both charts, the Accuracy Rate (%) then compares the number of Individual Fails to the total number of Scheme Members.

The TPR (The Pension Regulator) data scores were originally collected on a quarterly basis, but from June 2020 both have been collected monthly.

For more detail on the Data Items / Error types presented in these charts, please visit either the [TPR](#) or [PASA](#) (The Pension Administration Standards Association) websites.

Our Core Values

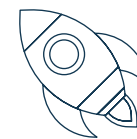
This administration report is produced in accordance with the Service Level Agreement (SLA) for the provision of pension administration services.

The report describes the performance of Local Pensions Partnership Administration (LPPA) against the standards set out in the SLA.

Within LPPA, our values play a fundamental role in guiding our behaviour as we grow our pensions services business and share the benefits with our Clients.



Annual Plan 2020/21



Forward
Thinking

ACTIVITY



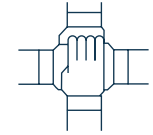
COMPLETED



DUE

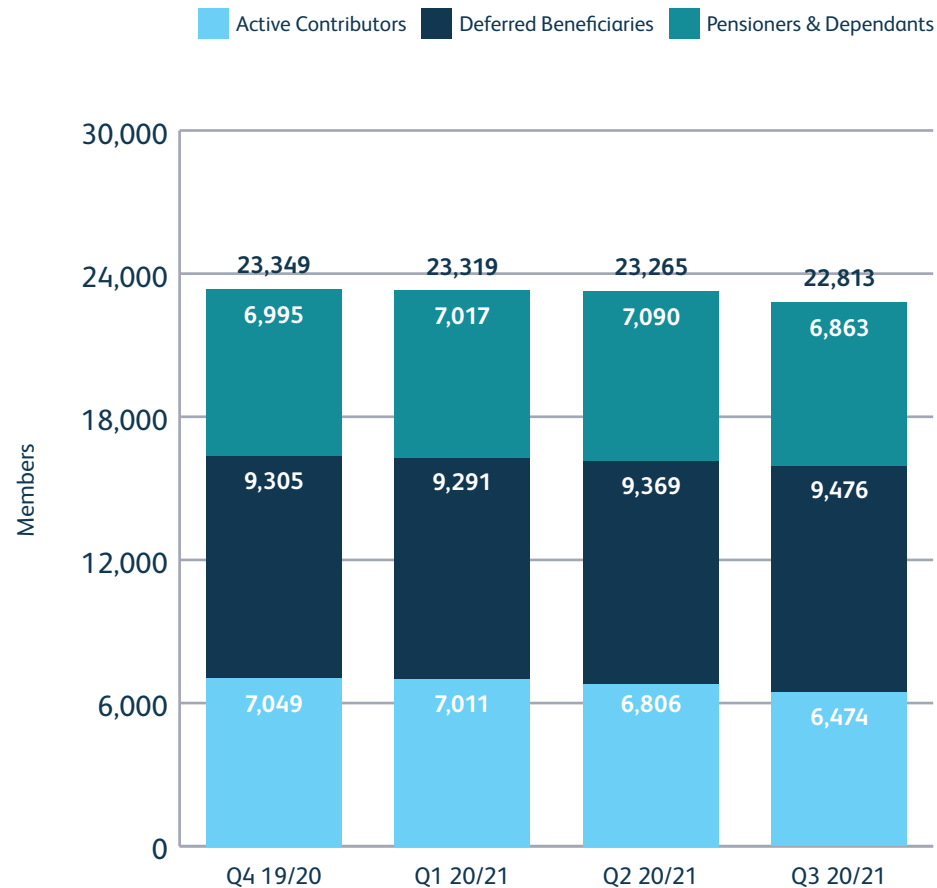
	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21
Annual Benefit Statement and Newsletter to Deferred Members		✓										
Pension Increases		✓										
Annual Benefit Statement and Newsletter to Active Members					✓							
Pension Saving Statements							✓					
HMRC Scheme Returns							✓					
IAS19 data				✓	✓				✓			

Fund Membership

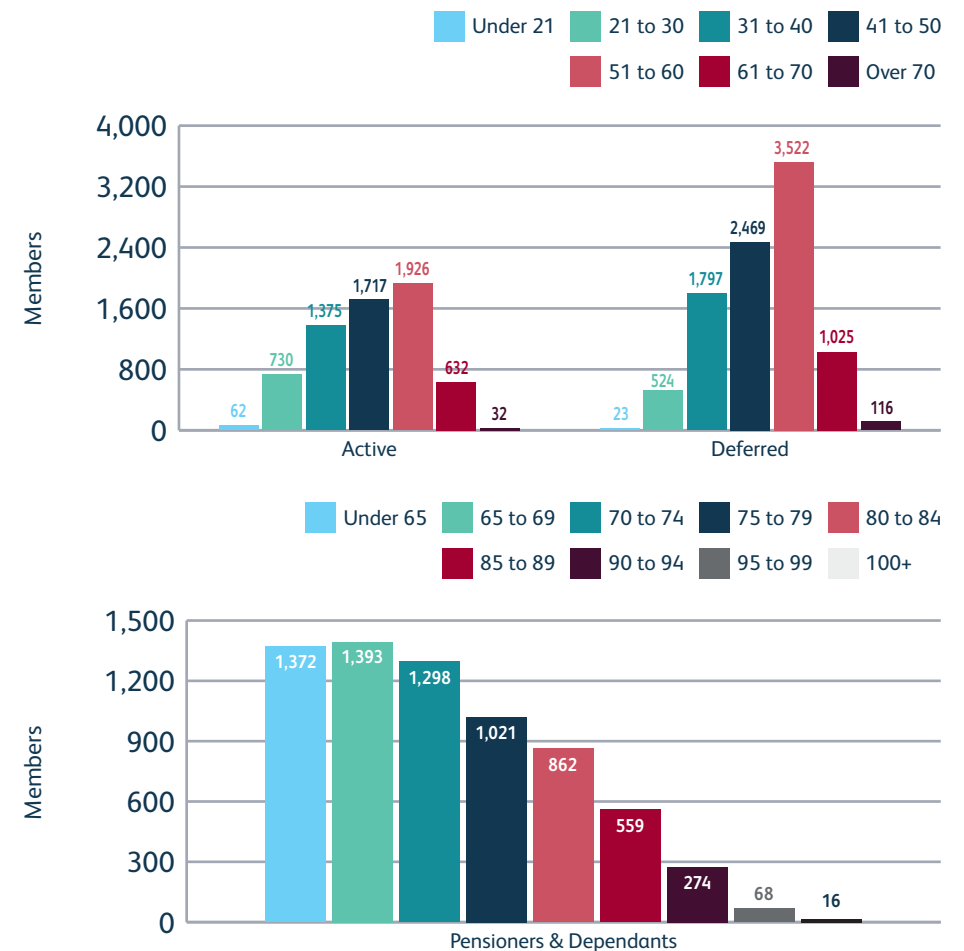


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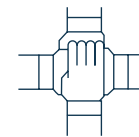
TOTAL FUND MEMBERSHIP



CURRENT AGE DEMOGRAPHIC



Fund Membership



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LEAVERS

These leavers are currently included in the active membership figures in the previous page.

Total Current Leavers	Received*	Pending**
847	67	780

* Received from employer and due to be worked by LPPA in line with SLA

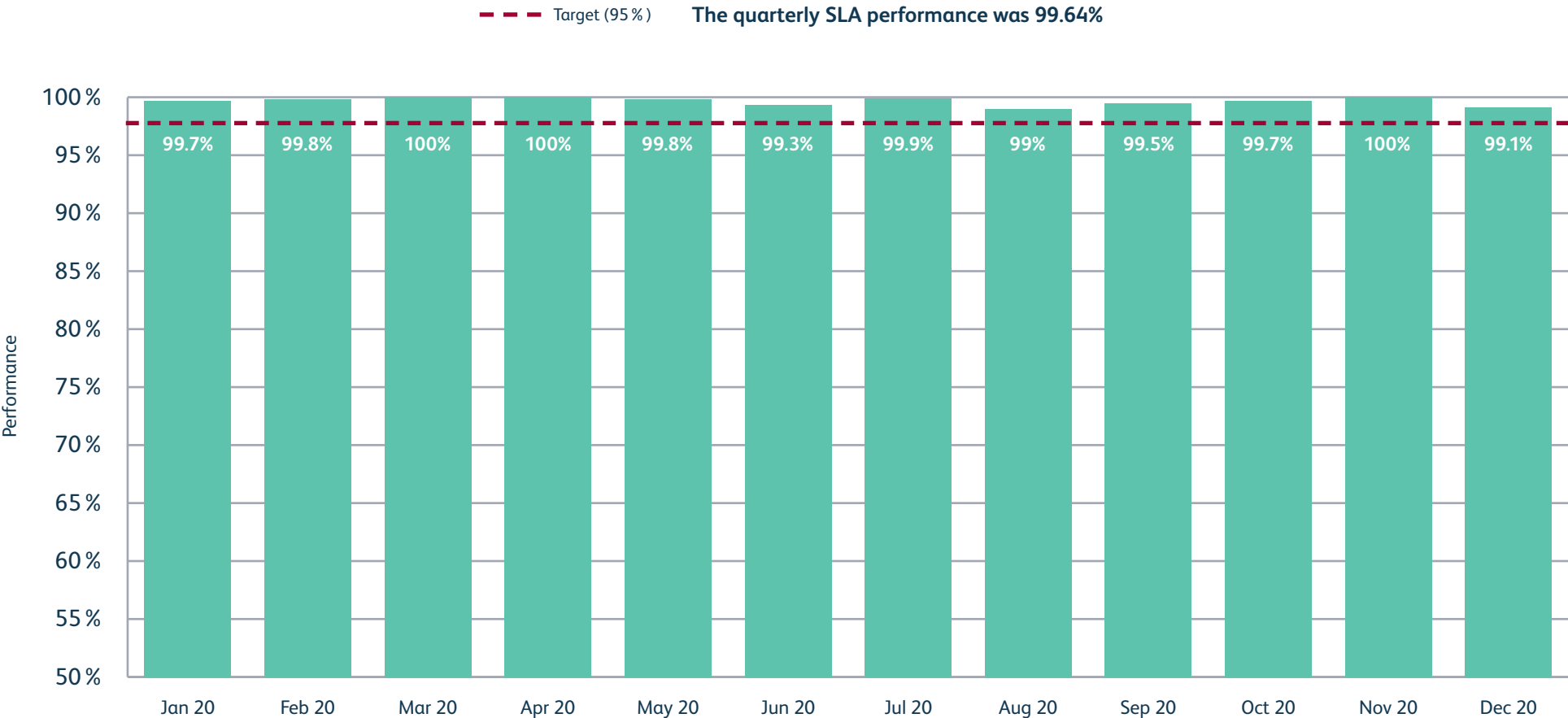
** Awaiting information from employer

Casework Performance Against SLA



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PERFORMANCE - ALL CASES



Casework Performance Against SLA



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QUARTERLY PERFORMANCE STANDARD

■ Target

	SLA target (working days)	Total Processed	92%	93%	94%	95%	96%	97%	98%	99%	100%
New starters	10	197									100%
Transfer In	10	89									100%
Transfer Out	15	95									100%
Estimate – Individual	10	118									100%
Deferred Benefits	10	506									100%
Deaths	5	215									100%
Retirements (immediate)	5	31									100%
Retirements (deferred)	5	301								99%	
Refunds	10	119									100%
Estimates – Employer	10	145									100%
Correspondence	10	254							98%		
Aggregation	30	75									100%
Other (see definitions – page 3)		345									99.7%

Casework Performance Against SLA



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ONGOING CASEWORK AT THE END OF THE REPORTING QUARTER

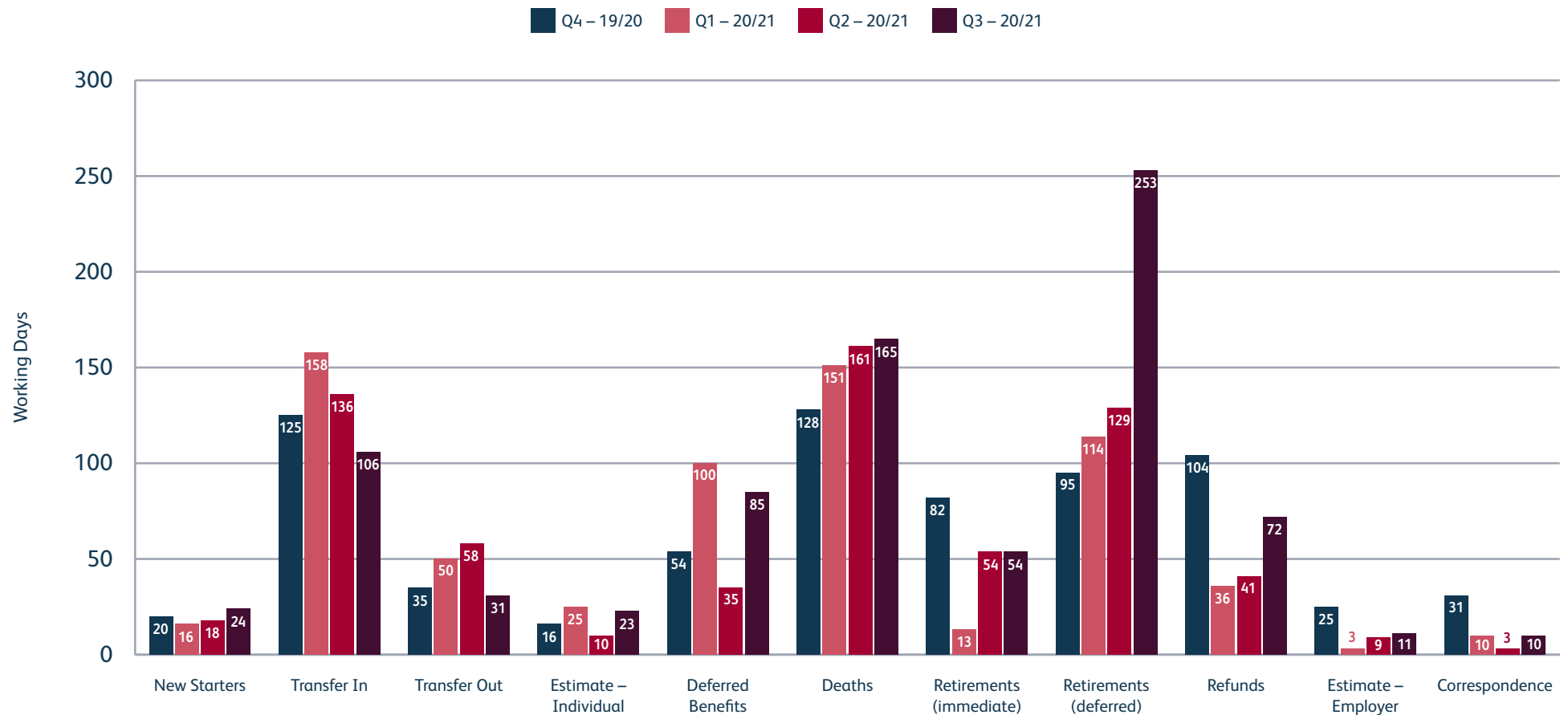
	Brought Forward at 30/09/20	Completed	Received	Outstanding as of 31/12/20
New Starters	60	197	165	28
Transfer In	146	89	61	118
Transfer Out	53	95	90	48
Estimate - Individual	39	118	100	21
Deferred Benefits	269	506	411	174
Deaths	439	215	148	372
Retirements (Immediate)	36	31	46	51
Retirements (Deferred)	310	301	121	130
Refunds	65	119	88	34
Estimates - Employer	50	145	106	11
Correspondence	34	254	250	30
Aggregation	69	75	51	45
Other <i>(see Definitions – page 3)</i>	217	345	263	135
TOTALS	1,787	2,490	1,900	1,197

Elapsed Times



Doing The
Right Thing

ELAPSED DAYS BY QUARTER



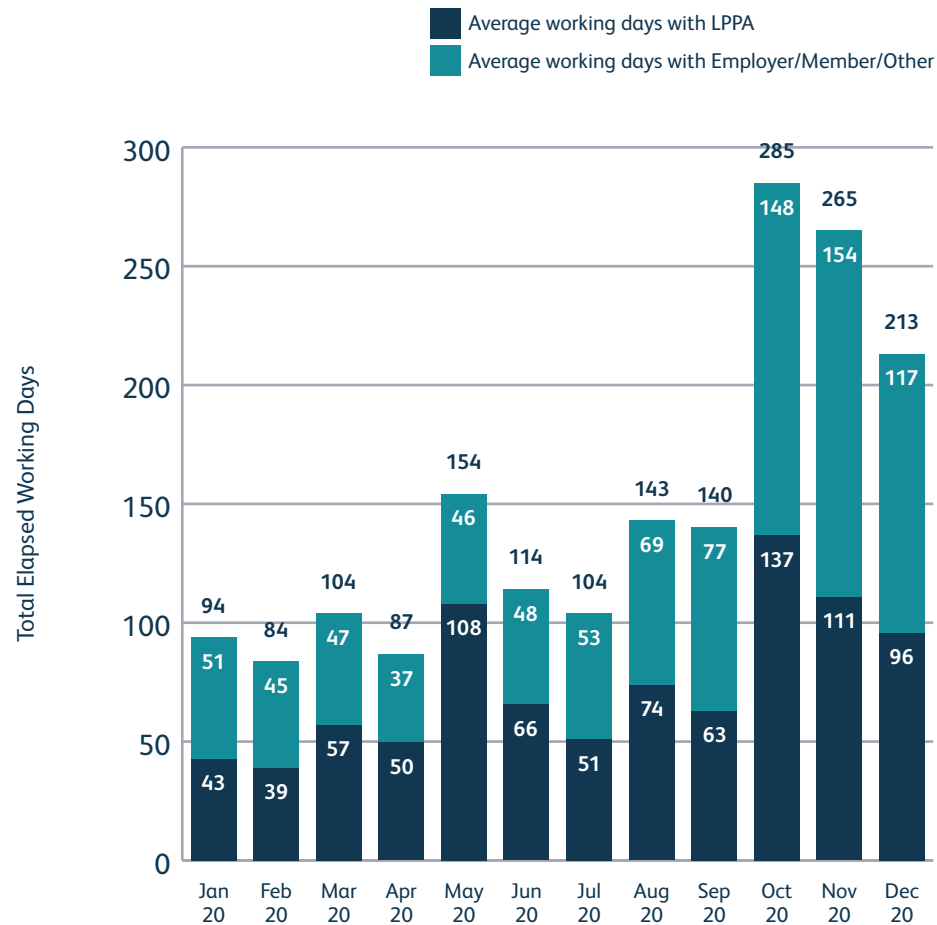
Elapsed Times (Retirements)



Doing The
Right Thing

DEFERRED INTO PAYMENT

REASONS ON HOLD



	Employer	Member	Other	Total
Jan 20	6.1	40.0	5.0	51.1
Feb 20	3.7	37.5	3.8	45.0
Mar 20	7.0	37.4	2.6	47.0
Apr 20	2.2	33.7	1.1	37.0
May 20	3.5	41.3	1.2	46.0
Jun 20	5.1	42.9	0.0	48.0
Jul 20	12.0	39.0	2.0	53.0
Aug 20	28.0	37.7	3.3	69.0
Sep 20	28.5	37.3	11.2	77.0
Oct 20	14.1	31.6	102.3	148.0
Nov 20	12.9	30.8	110.3	154.0
Dec 20	28.1	46.2	42.7	117.0

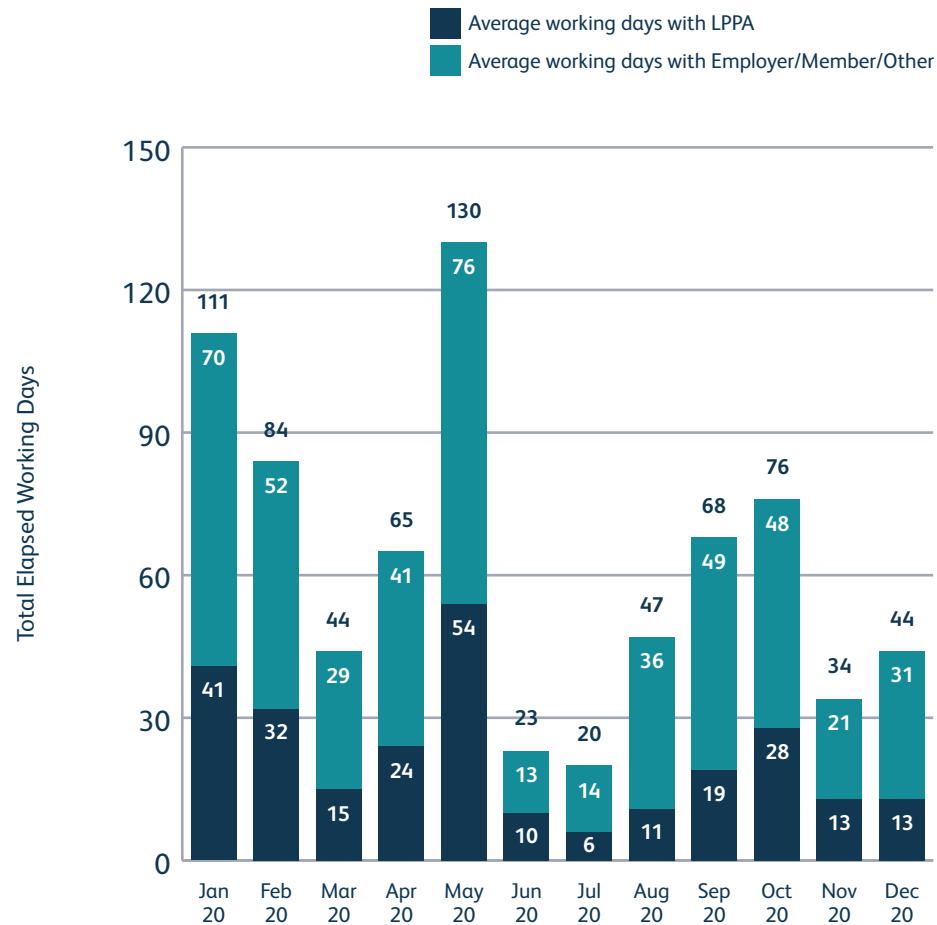
Elapsed Times (Retirements)



Doing The
Right Thing

ACTIVE INTO PAYMENT

REASONS ON HOLD



	Employer	Member	Other	Total
Jan 20	18.0	52.0	0.0	70.0
Feb 20	13.0	33.4	5.7	52.1
Mar 20	6.4	21.0	1.6	29.0
Apr 20	11.6	29.4	0.0	41.0
May 20	35.9	39.9	0.2	76.0
Jun 20	0.0	13.0	0.0	13.0
Jul 20	9.2	4.8	0.0	14.0
Aug 20	15.5	20.5	0.0	36.0
Sep 20	31.9	17.2	0.0	49.1
Oct 20	24.6	17.4	6.0	48.0
Nov 20	8.2	12.8	0.0	21.0
Dec 20	16.1	10.8	4.1	31.0

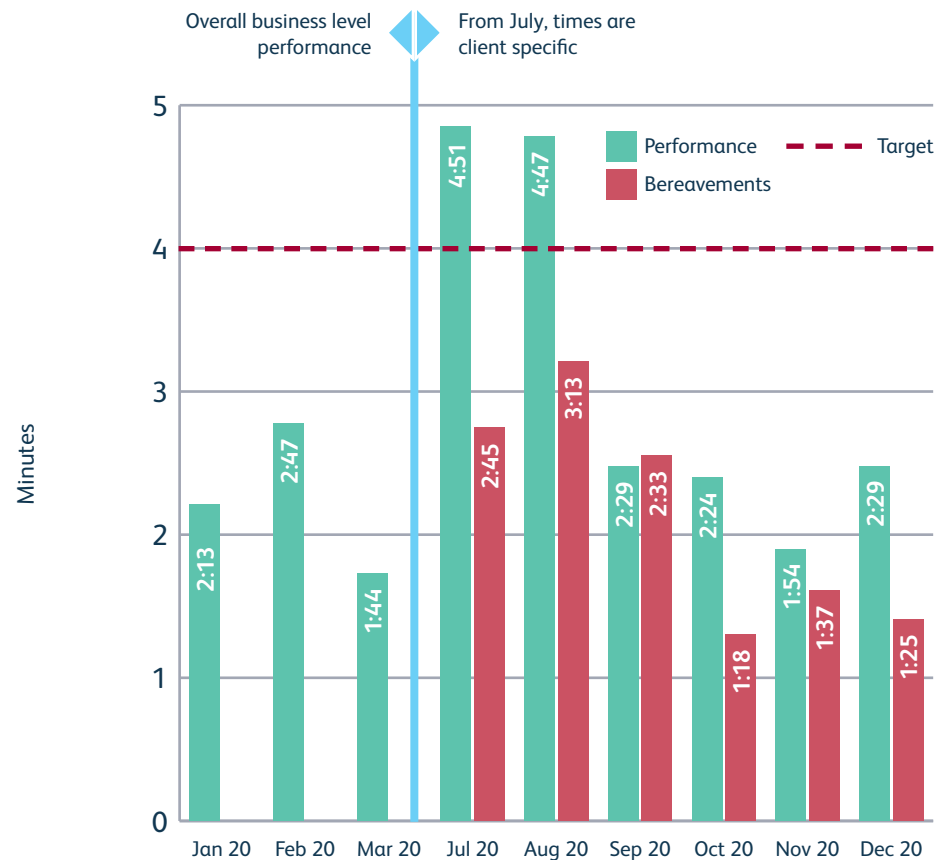
Helpdesk Performance - Calls



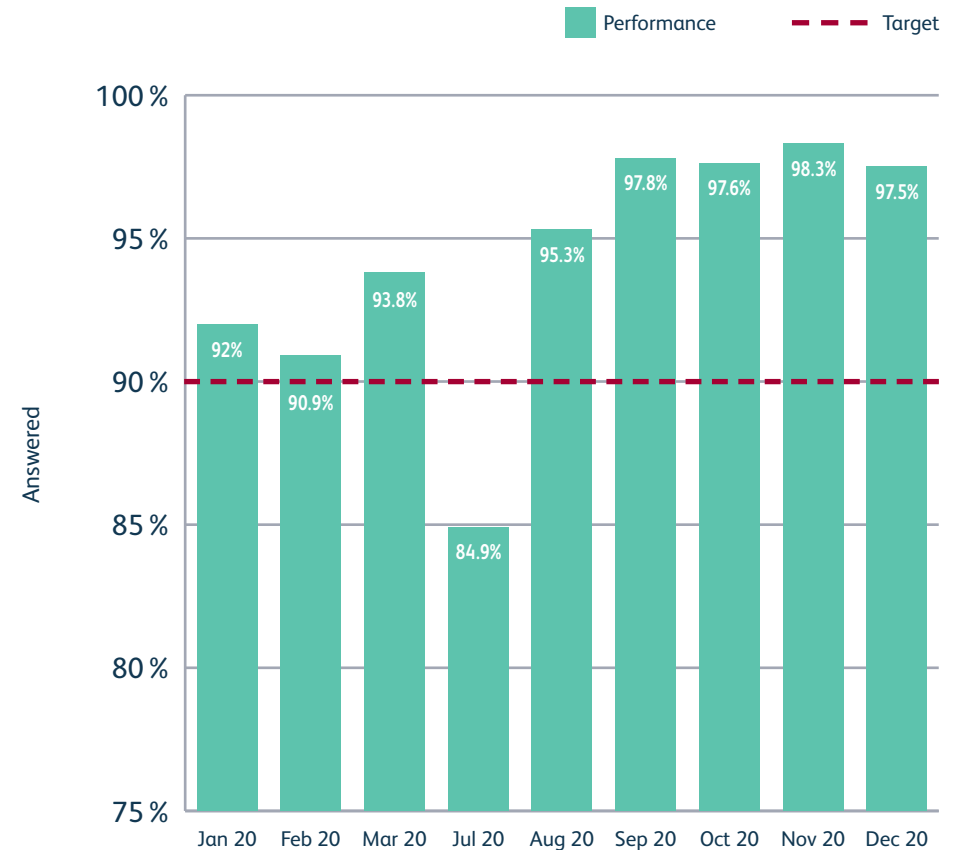
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AVERAGE WAIT TIME

The Helpdesk deals with all call and e-mail enquiries from both members and employers for all funds that LPPA provide administration services for. The call data could not be collected between April and June due to the change in the way LPPA had to work during lockdown. LPPA implemented remote working and maintained an operational contact team but lost the management information temporarily.



CALLS ANSWERED



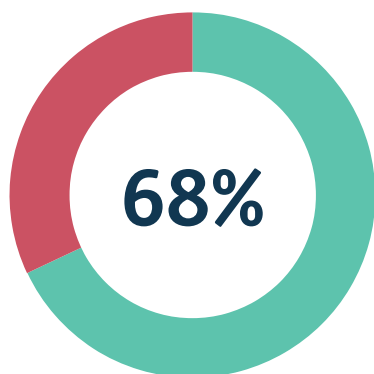
Helpdesk Performance - Calls



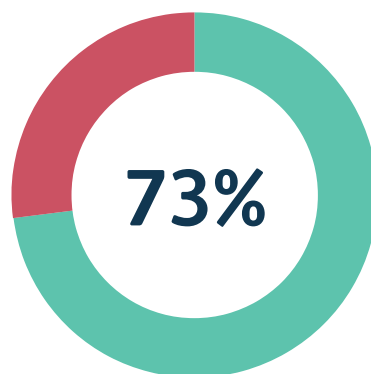
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RESOLUTION RATE* (TARGET 75%)

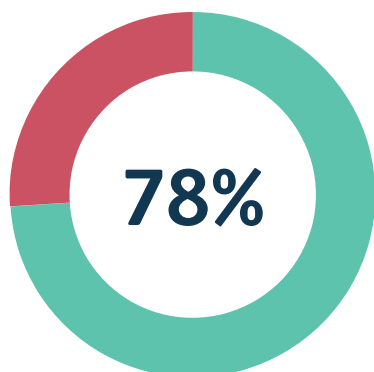
OCTOBER



NOVEMBER



DECEMBER



WHAT DO MEMBERS & EMPLOYERS CALL ABOUT?

	OCT 20	NOV 20	DEC 20
Annual Benefit Statement	5	2	5
Annual Allowance	0	3	2
Additional Voluntary Contributions / Additional Pension Contributions	3	3	1
Bereavement	68	42	31
Deferred	4	3	5
Divorce	15	5	2
Estimate	23	26	15
Life Certificates	1	0	0
My Pension Online	24	22	25
P60	8	2	1
Payslip	16	8	7
Pension Increase	0	0	1
Refund	24	7	8
Retirement	120	121	67
Transfer	48	44	18
Update Details	12	14	5

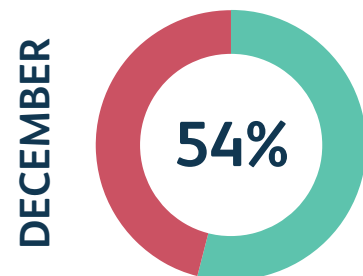
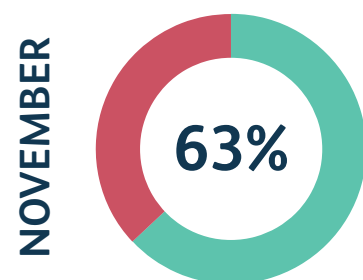
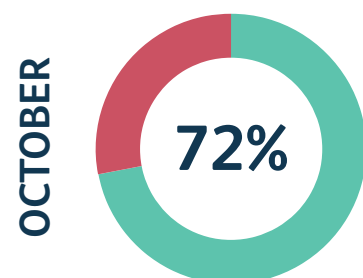
*Queries not resolved at first point of contact had a subsequent case setup. Our operations team then respond within agreed contractual time-scales.

Helpdesk Performance - Emails

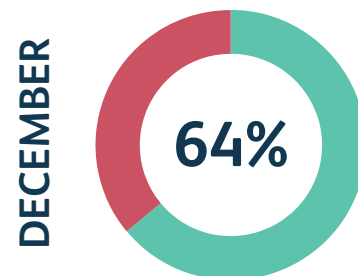
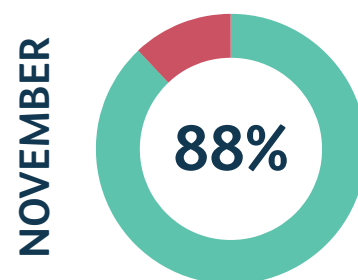
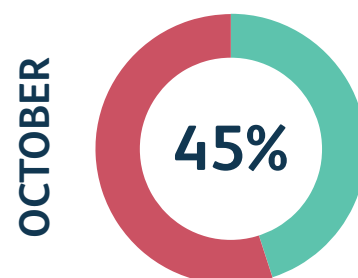


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RESOLUTION RATE* (TARGET 75%)



WITHIN SLA (2 WORKING DAYS)



WHAT DO MEMBERS & EMPLOYERS EMAIL ABOUT?

	OCT 20	NOV 20	DEC 20
Annual Benefit Statement	6	9	3
Annual Allowance	0	6	2
Additional Voluntary Contributions / Additional Pension Contributions	2	2	6
Bereavement	19	64	154
Deferred	1	2	2
Divorce	15	44	139
Estimate	14	13	15
Life Certificates	0	1	0
My Pension Online	7	14	14
P60	1	4	0
Payslip	6	2	3
Pension Increase	0	1	0
Refund	15	16	16
Retirement	38	58	77
Transfer	43	41	45
Update Details	21	15	21

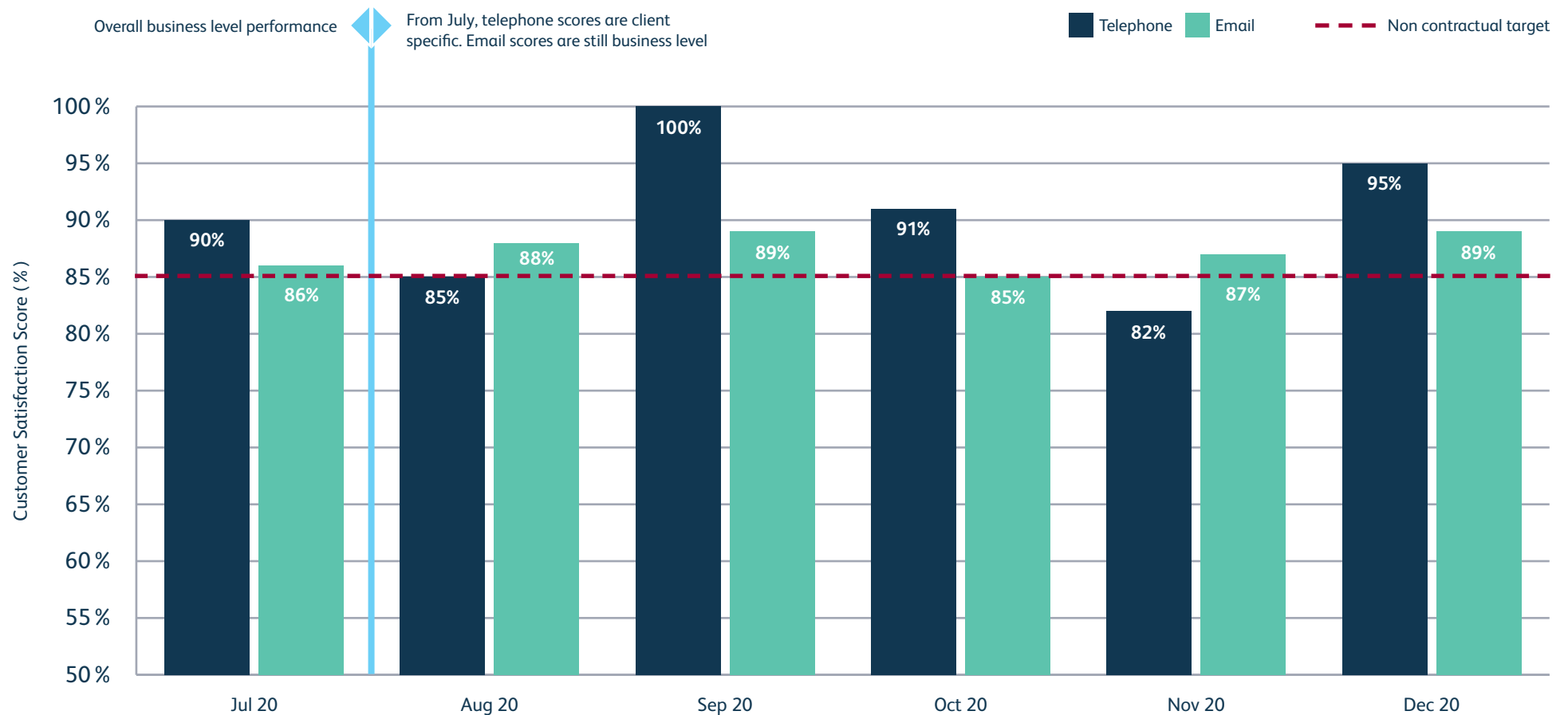
*Queries not resolved at first point of contact had a subsequent case setup. Our operations team then respond within agreed contractual time-scales.

Customer Satisfaction Scores



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HELPDESK SATISFACTION

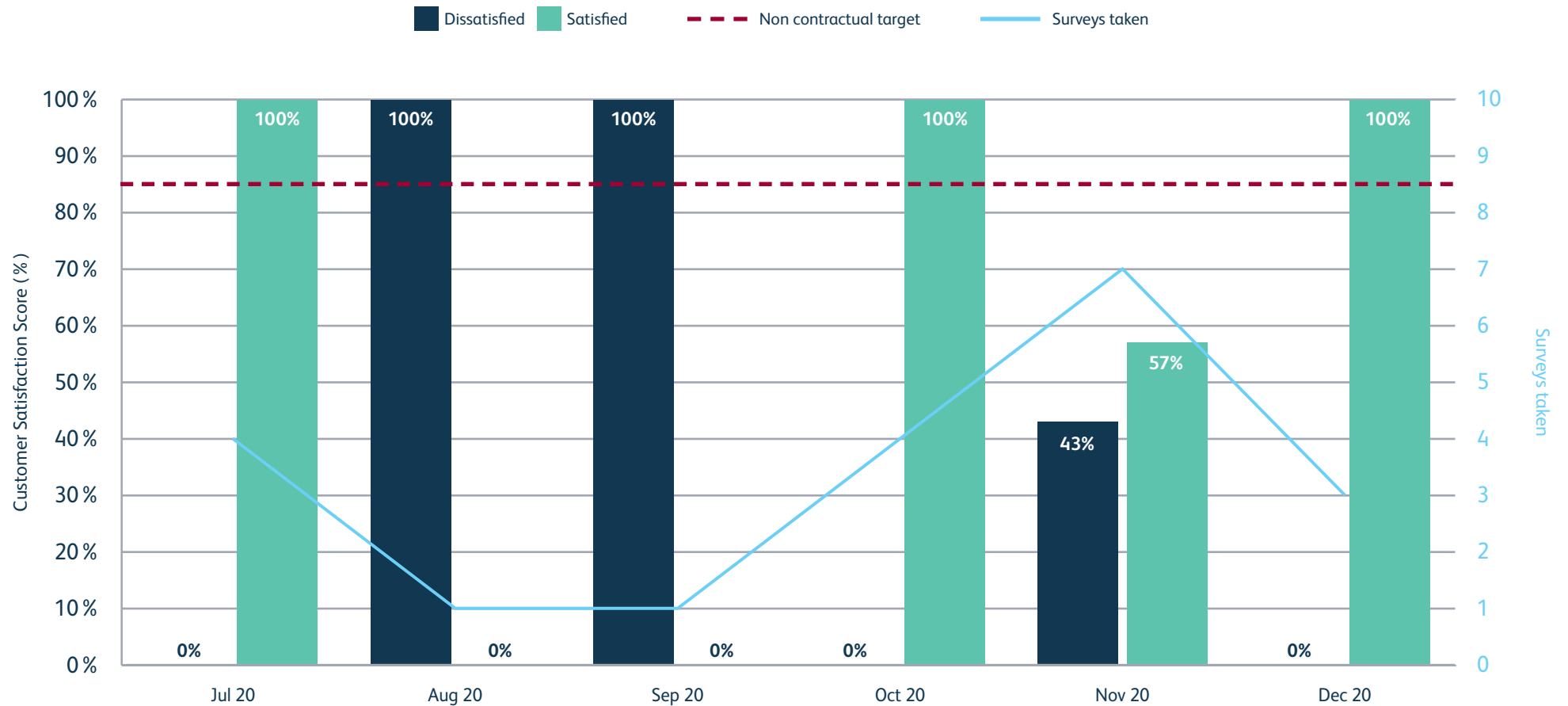


Customer Satisfaction Scores

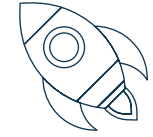


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RETIREMENTS

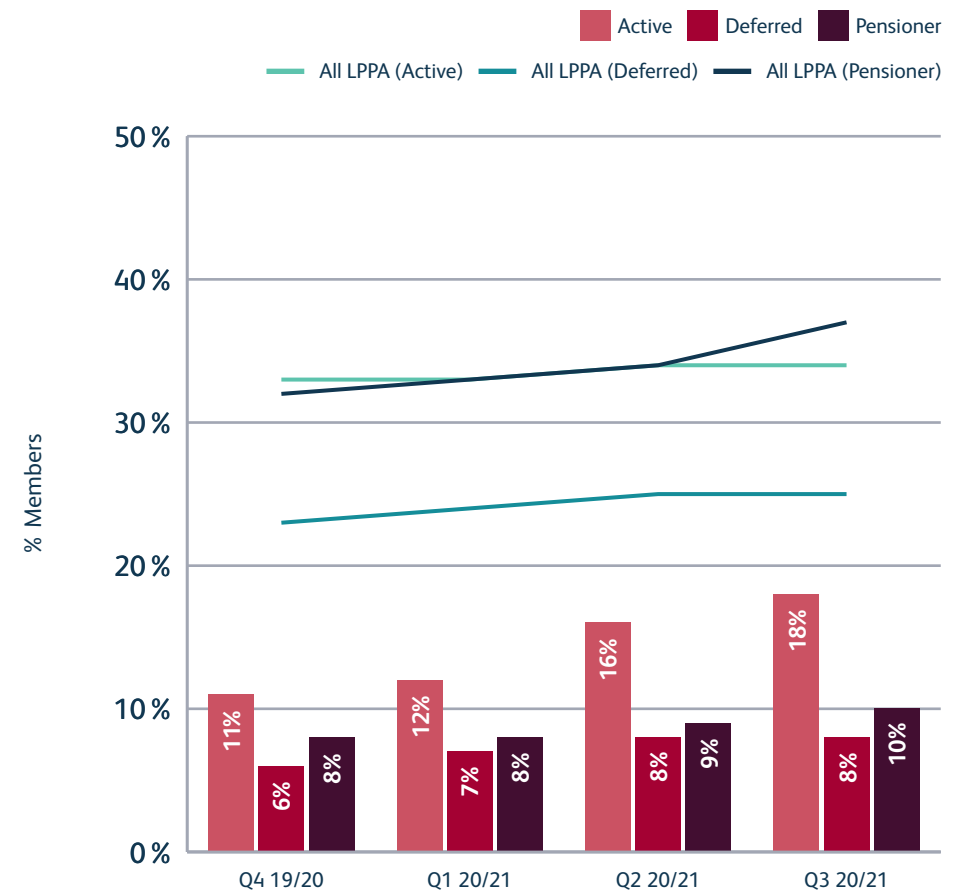
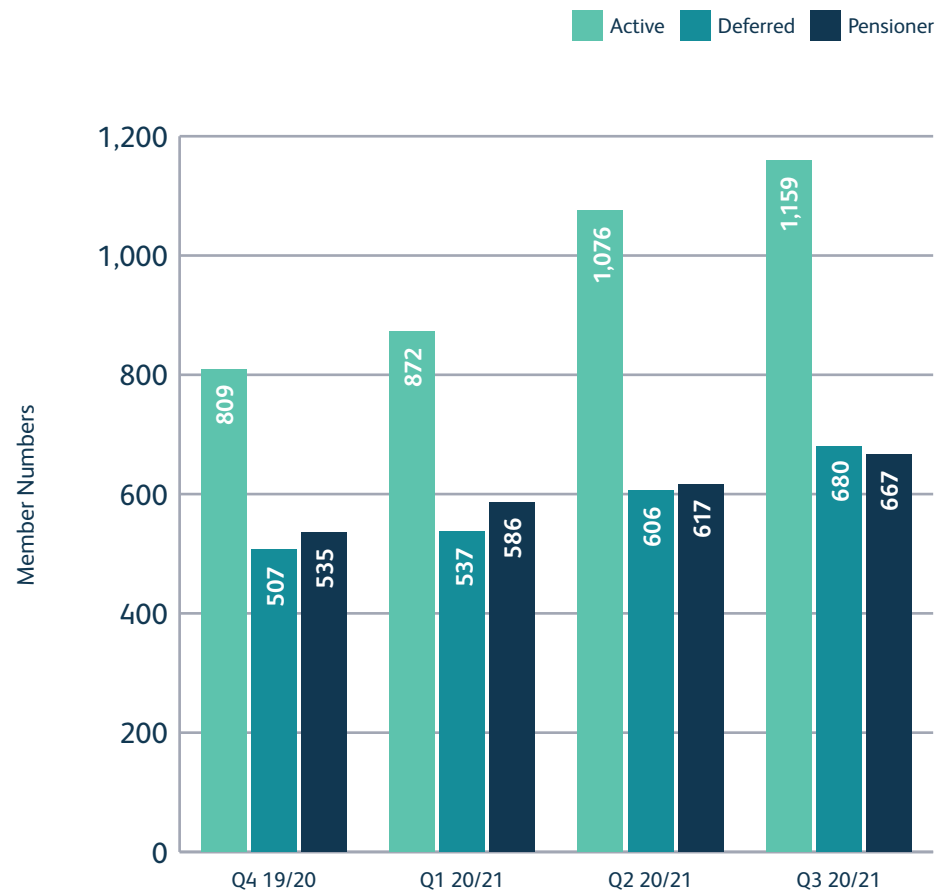


My Pension Online

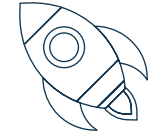


Forward
Thinking

MEMBERS REGISTERED

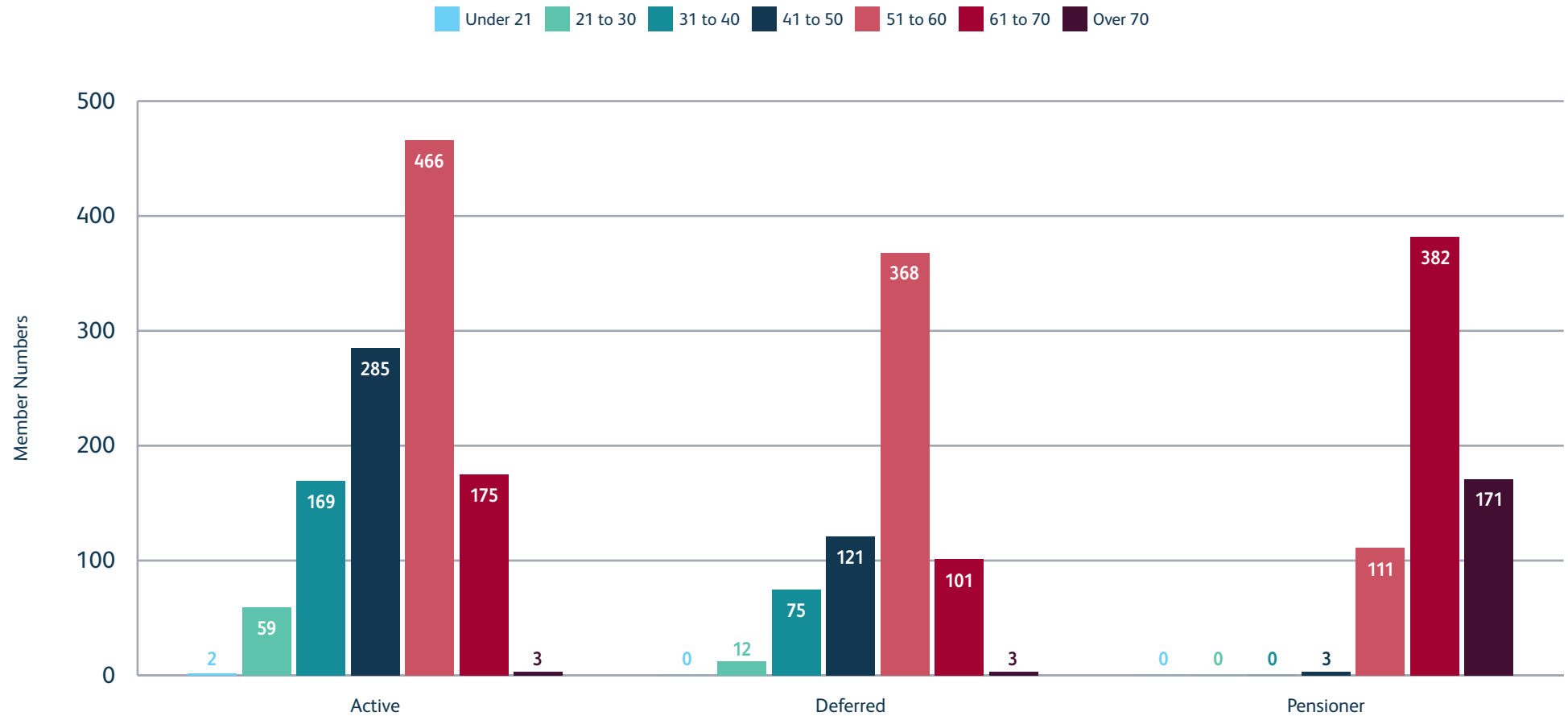


My Pension Online

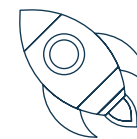


Forward
Thinking

AGE DEMOGRAPHIC



Service Improvements



Forward
Thinking

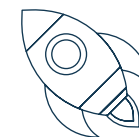
DELIVERED

1	New LPPA website launched
2	Bulk emails issued to Employers and Members to communicate the site launch
3	LiveChat launched on the website, to offer Members an alternative channel to contact the Helpdesk
4	Online Employer training sessions continue to be delivered remotely
5	Operational teams realigned to improve pension administration processes
6	Exit Cap communications to Clients and Employers
7	Data quality improvements – Member email and telephone details captured by Helpdesk advisers
8	Launched bereavement booklet
9	Introduced dedicated checking team

SCHEDULED

1	Overseas Members – Life Certificate email activity (January)
2	End of Year data returns (employer training and planning)
3	P60 campaign planning
4	Pensioner Newsletter (Spring)

Member Contact Data



Forward
Thinking

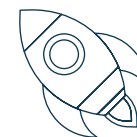
EMAIL ADDRESSES

	Q4 – 19/20	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21
Active Contributors	1,710 (24.26%)	1,777 (25.35%)	2,031 (29.84%)	3,092 (47.76%)
Deferred Beneficiaries	1,359 (17.17%)	1,357 (17.22%)	1,481 (18.72%)	1,643 (20.47%)
Pensioner and Dependants	961 (13.74%)	1,014 (14.45%)	1,054 (14.87%)	1,152 (16.79%)

TELEPHONE NUMBERS

	Q4 – 19/20	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21
Active Contributors	274 (3.89%)	286 (4.08%)	320 (4.70%)	388 (5.99%)
Deferred Beneficiaries	296 (3.18%)	302 (3.25%)	324 (3.46%)	382 (4.03%)
Pensioner and Dependants	593 (8.48%)	609 (8.68%)	632 (8.91%)	691 (10.07%)

Member Contact Data



Forward
Thinking

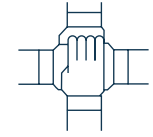
DEATH NOMINATION

	Q4 – 19/20	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21
Active Contributors	–	491 (7%)	579 (8.51%)	639 (9.87%)

E-COMMUNICATIONS OPT-OUT

	Q4 – 19/20	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21
Active Contributors	14 (0.20%)	14 (0.20%)	13 (0.19%)	13 (0.20%)
Deferred Beneficiaries	31 (0.33%)	27 (0.29%)	27 (0.29%)	28 (0.30%)
Pensioner and Dependants	367 (5.25%)	372 (5.30%)	369 (5.20%)	361 (5.26%)

Engagement Activity



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SUMMARY

This Quarter's biggest event for Engagement was the launch of the new LPPA Website. A presentation of the new site was made to all Clients, launch emails were issued which included the contactable Member database (c. 180k). As a direct result, approximately 1,700 new MPO registrations were recorded in December.

The new LiveChat function was tested and launched alongside the new website, this is now being successfully used by Members to talk directly with Helpdesk advisers to resolve queries.

As part of the continued Member data collection campaign, from October 2020 the Helpdesk now capture email addresses and telephone numbers during calls. This supports the ongoing exercise initiated to collect Member contact data via Employers.

Throughout Q3 the Employer Engagement Team has focused on two main Employer campaigns, 'Assumed Pensionable Pay and Absence' and 'Ill Health Awareness'.

The 'Assumed Pensionable Pay and Absence' campaign email generated over 200 registrations to attend 2 training sessions covering 'Assumed Pensionable Pay and Absence'.

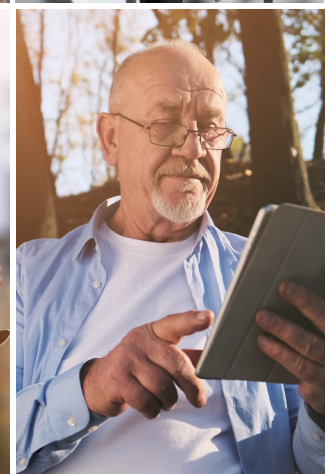
The 'Ill Health Awareness' campaign email attracted almost 100 attendees across two separate online training events.

Overall, the team delivered over 60 online sessions reaching out to almost 400 Employers, and held 15 Member awareness sessions to 185 members.

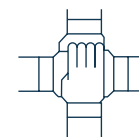
Several emails relating to the 'Exit Cap' have been issued to Employers keeping them up to date on this high-profile topic.

An email was issued to Employers to reinforce the "Importance of sending leaver forms in a timely / accurate manner" and provided signposting for Employers to the relevant sections of the new website.

In addition to the various campaigns and communications detailed in this report, the team continue to engage with Employers and Members through regular virtual visits and support meetings.



Engagement Activity (Employers)



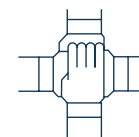
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EMPLOYERS

Date	Employer	Activity	Number in attendance
13 Oct 2020	Ark Elvin Academy	Visit	1
09 Nov 2020	Kingsbury Green JM School	Training	1
12 Nov 2020	Barnardos	Support	1
15 Dec 2020	St Robert Southwell Catholic Primary School	Training	1
15 Dec 2020	Roe Green Infant & Junior Schools	Training	1
15 Dec 2020	JFS	Training	3
15 Dec 2020	Capital City Academy	Training	1
15 Dec 2020	Compass Learning Partnership	Training	1
15 Dec 2020	Wembley Primary School	Training	1
15 Dec 2020	Oliver Goldsmith Primary School	Training	1
15 Dec 2020	Phoenix Arch School	Training	1
15 Dec 2020	Elsley Primary School	Training	1
15 Dec 2020	Brent Specialist Academy Trust	Training	1
15 Dec 2020	St Mary Magdalen's Catholic Junior School	Training	1
15 Dec 2020	Making the Leap	Training	1
15 Dec 2020	Byron Court Primary School	Training	1
15 Dec 2020	L B Brent	Training	1
15 Dec 2020	St Joseph's Infant and Junior Schools	Training	1

Date	Employer	Activity	Number in attendance
15 Dec 2020	Uxendon Manor	Training	1
15 Dec 2020	Manor School	Training	1
16 Dec 2020	Kingsbury Green JM School	Visit	1
17 Dec 2020	Alperton Community School	Training	1
17 Dec 2020	Brent Council	Training	2
17 Dec 2020	Capital City Acedmy	Training	1
17 Dec 2020	JFS School	Training	2
17 Dec 2020	Kingsbury High School	Training	1
17 Dec 2020	Leopold Primary School	Training	1
17 Dec 2020	Oliver Goldsmith Primary School	Training	1
17 Dec 2020	Phoenix Arch School	Training	1
17 Dec 2020	St Josephs Junior School	Training	1

Engagement Activity (Members & Emails)



Working
Together

EMAILS – EMPLOYERS

Date	Message / Campaign	Call to Action
07 Oct 2020	Ill health Promo Campaign	Book on training
12 Oct 2020	Exit Cap 1	Information
21 Oct 2020	Ill Health Campaign Reminder	Book on training
02 Nov 2020	Exit Cap 2	Information
05 Nov 2020	Exit Cap 3 Message from LGA	Information

EMAILS – MEMBERS

Date	Message / Campaign	Number of Emails Sent
22 Oct 2020	My Pension Online Activation Keys	901
26 Oct 2020	My Pension Online Activation Keys (Follow up)	760
13-24 Nov 2020	Pre-Launch Website Update	197,681
08 Dec 2020	Website Now Live	189,821
Weekly Email	Surveys (Bereavement, Transfer Out, Estimate, Retirement)	

Data Quality (TPR scores)



Doing The
Right Thing

COMMON DATA

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	4	71	34
Surname	0	0	0
Forename / Initials	0	6	8
Sex	0	0	0
Date of Birth	0	0	0
Date started pensionable service / Policy / Contributions	0	0	0
Expected retirement / maturity / target retirement date	0	0	0
Membership status	0	0	0
Last event status	0	0	0
Address	125	814	47
Postcode	127	860	57
Total fails	256	1,751	146
Individual fails	127	860	57
Total members	6,474	9,476	6,863
Accuracy rate	98.0%	90.9%	99.2%

Total accuracy rate

95.0%

Data Quality (TPR scores)



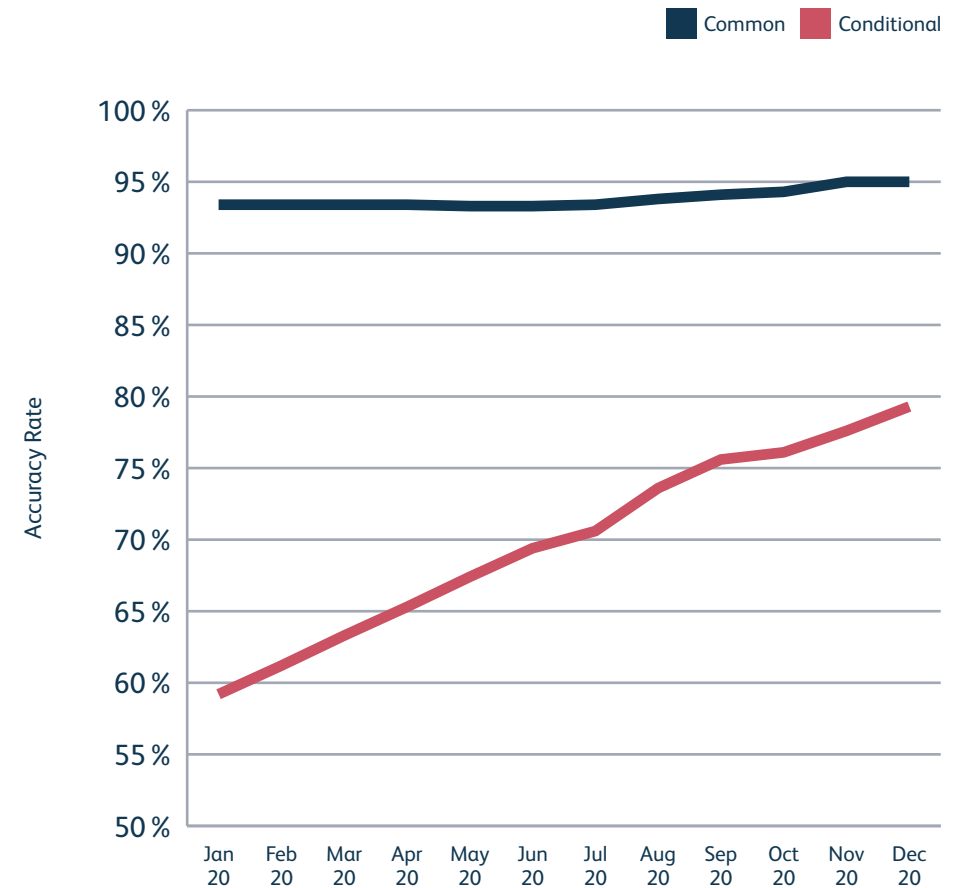
Doing The
Right Thing

CONDITIONAL DATA

Data Item	Fails
Divorce records	0
Transfer In	5
AVC's / Additional Contributions	0
Deferred Benefits	4
Tranches (DB)	676
Gross Pension (Pensioners)	17
Tranches (Pensioners)	1,207
Gross Pension (Dependants)	18
Tranches (Dependants)	18
Date of leaving	1
Date Joined Scheme	0
Employer Details	0
Salary	1,032
Crystallisation	120
Annual Allowance	392
LTA Factors	0
Date Contracted Out	5
Pre-88 GMP	1,018
Post-88 GMP	690
Total fails	5,203
Individual fails	4,723
Total members	22,813

Total accuracy rate 79.3%

COMMON & CONDITIONAL ACCURACY RATE



LPP

Local Pensions Partnership
Administration