



LPP

Local Pensions Partnership
Administration

Brent Pension Fund

Quarterly Administration Report

1st April – 30th June 2023

lppapensions.co.uk

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DEFINITIONS

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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 11

Casework Performance Against SLA

Performance is measured once all information is made available to LPPA to enable them to complete the Process. Relevant processes are assigned a target timescale for completion, and the performance is measured as the percentage of processes that have been completed within that timescale.

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Casework Performance Against SLA

The category of 'Other' on this page covers processes including, but not limited to:

- APC/AVC Queries
- Additional Concs Cessation
- Change of Hours
- Change of Personal Details
- Under Three Month Opt-Out
- Main to 50:50 Scheme Changes
- Divorce Quotes
- Divorce Settlement
- Ill Health Reviews

Please note that this page includes cases that have met the SLA target, but the stop trigger may also have been actioned before the process has been completed.

Page 13

Ongoing Casework at the end of the Reporting Quarter

Please note the number of processes brought forward, does not match the corresponding number of outstanding processes reported in the previous quarter (due to various reasons which can include; but not limited to, the deletion of a process or changes in assigned categories).

Page 15 & 16

Helpdesk Performance

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

Page 21 & 22

Member Online Portal

The number and percentage of records that are registered for LPPA's Member Self-Service facility, PensionPoint.

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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.

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

✓ COMPLETED 📅 DUE

	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
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			✓		📅				📅			📅

EXECUTIVE SUMMARY

Forward thinking...
Working together...
Doing the right thing...
Committed to excellence...

This performance report covers the reporting period of Q1 2023/24 (April – June 2023)

Casework and Helpdesk performance metrics are trending in the right direction but this is not yet translating fully through to the member, employer and client experience. Performance is starting to “look green” but doesn’t yet “feel green”. This is due to a number of factors, including:

- The spikes in work for bereavements and retirements from Project PACE were cleared in line with plans. This was achieved at the end of June, hence some delays persisted through Q1 2023.
- Expressions of dissatisfaction are a lag indicator, typically 2-3 months and member, employer and client experience takes some time to catch up with performance improvement

All public service pension schemes use the SCAPE (Superannuation Contributions Adjusted for Past Experience) rate, to work out the factors used to calculate the Cash Equivalent Transfer Value (CETV) for certain transfers and divorce calculations. Factors were unavailable from the beginning of April and all impacted calculations were on hold until the new factor tables were issued in June 2023.

Payroll

All pensioner payroll and lump sum payments due in the reporting period were made on time (this equates to over £100m, across all clients, in pension payments per month).

Statutory deadlines

All regulatory and statutory deadlines due in the reporting period were met.

- Pensions Increase was successfully run.
- P60s produced and made available to members.
- Newsletter issued to retired members.

Casework SLA performance

Overall performance against SLAs is trending in the right direction, however performance has been impacted by a focus to clear cases that had already failed the SLA due to the impact of Project PACE. Cases that have missed SLA impact the performance measure when they are completed and not when they miss.

As confirmed in the previous quarterly performance report, the SLAs are measured in line with contractual obligations.

EXECUTIVE SUMMARY CONTINUED

Forward thinking...
Working together...
Doing the right thing...
Committed to excellence...

Satisfaction scores

Helpdesk satisfaction score at the end of Q1, was 71 %. Lower satisfaction scores point to the quality of the call and some members felt that their query was not resolved fully. LPPA has had a large number of new starters in the Helpdesk and although training does take place before call handlers are allocated to call queues, members can and do ask questions that new call handlers have not been trained to answer. Further cross-skilling and upskilling is underway to equip call handlers to handle the wide variety of calls received into LPPA.

Retirement satisfaction scores reduced during the period. At the end of Q1, satisfaction was 58 %, at the end of Q4 satisfaction was 69 %. Retirement satisfaction scores are generally a lag indicator and lower satisfaction was expected due to the impact of Project PACE and the disruption caused through the first few months of 2023.

Pensions Helpdesk

Helpdesk performance for the period has seen average call wait time below the non-contractual target of 4 minutes, at an average of 3 minutes 42 seconds. Despite high call volumes during a seasonally busy time, due to Pensions Increase, tax code changes and P60, Helpdesk performance continues to trend in the right direction.



Fund Membership

In this section...

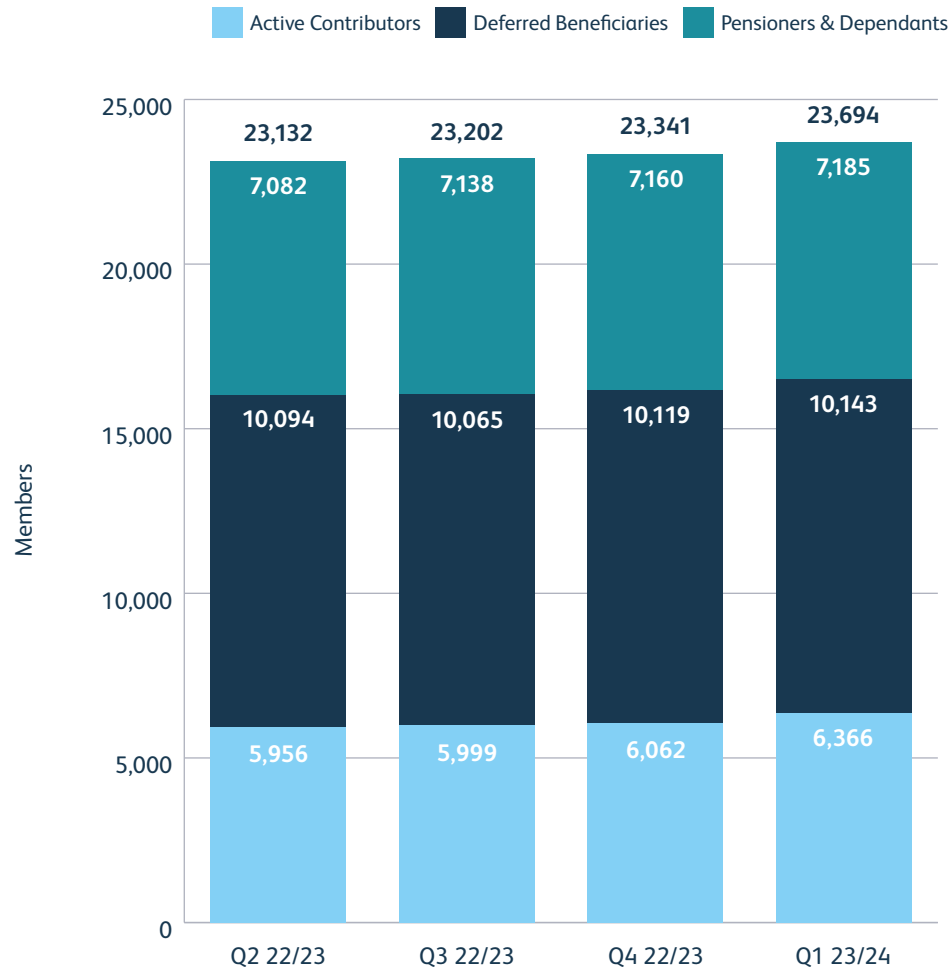
- Total fund membership
- Current age demographic

TOTAL FUND MEMBERSHIP



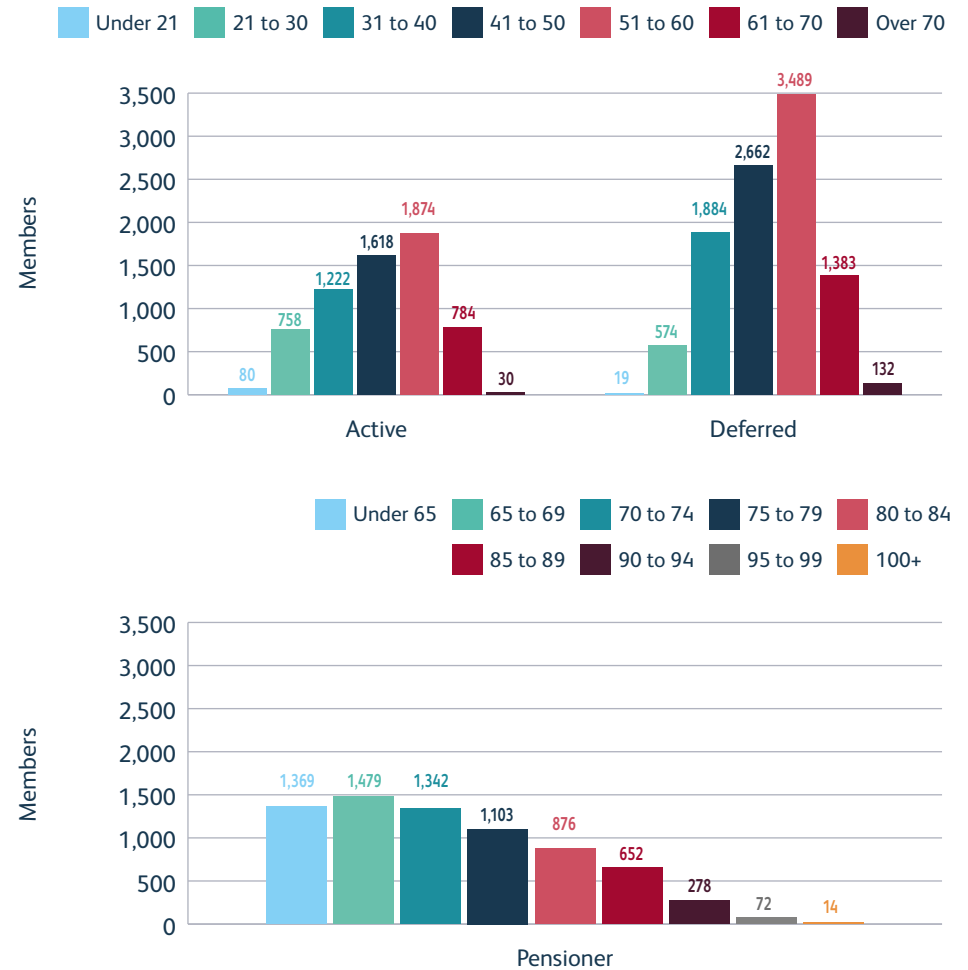
TOTAL FUND MEMBERSHIP

CLIENT SPECIFIC



CURRENT AGE DEMOGRAPHIC

CLIENT SPECIFIC



Casework Performance

In this section...

- Performance – all cases
- Performance standard
- Ongoing casework at end of reporting quarter

CASEWORK PERFORMANCE

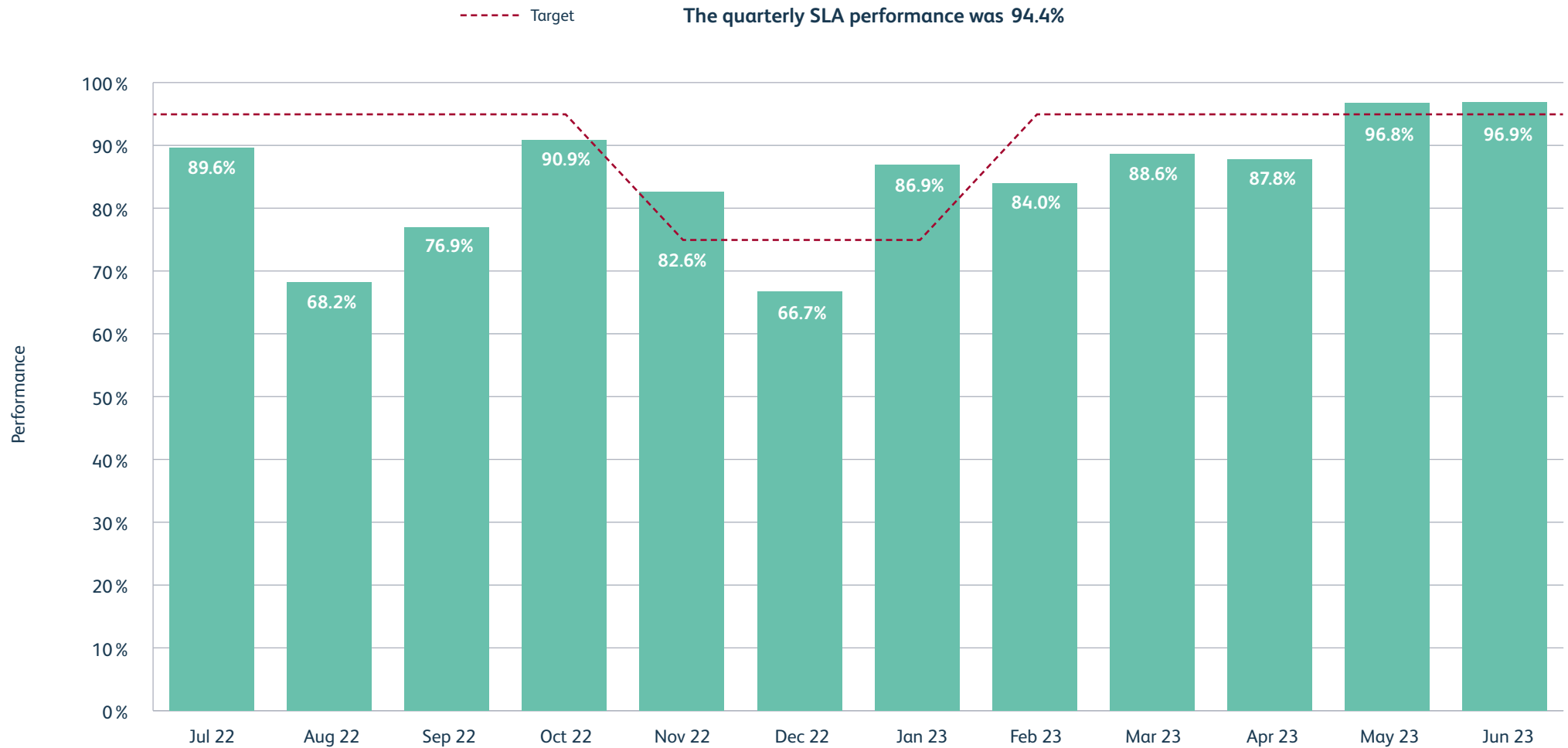
Please note:

Agreed with clients that LPPA's monthly operational targets would be relaxed from Nov 22 to Jan 23, in line with UPM migration timings (22/23).



PERFORMANCE – ALL CASES

CLIENT SPECIFIC

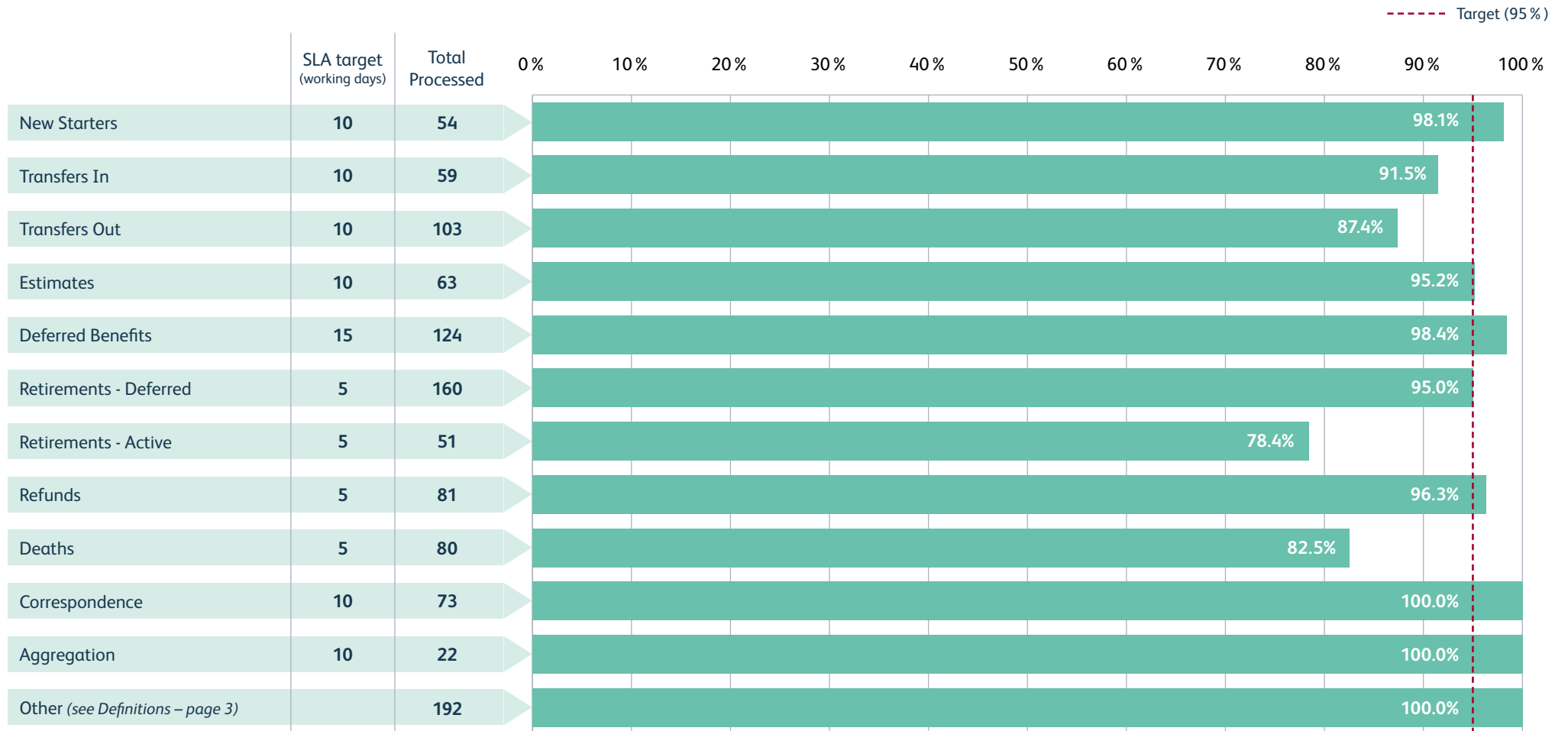


CASEWORK PERFORMANCE



PERFORMANCE STANDARD

CLIENT SPECIFIC



CASEWORK PERFORMANCE

ONGOING CASEWORK AT THE END OF THE REPORTING QUARTER CLIENT SPECIFIC

The following table is created by identifying all reportable casework within UPM, and includes those that have subsequently Completed / Aborted / Remain Outstanding within the quarter. The figures in this table cannot be compared to those in the previous slide for a number of reasons including: the table includes aborted cases, but the horizontal bar graph does not; the SLA 'stop trigger' can be actioned before the process has been completed.

	Brought Forward at 01/04/23	Received (Inbound)	Completed (Outbound)	Outstanding as of 30/06/23
New Starters	17	53	69	1
Transfers In	208	82	84	206
Transfers Out	224	140	134	230
Estimates	28	90	67	51
Deferred Benefits	173	155	159	169
Retirements - Deferred	172	209	172	209
Retirements - Active	70	87	82	75
Refunds	47	88	102	33
Deaths	191	112	114	189
Correspondence	73	116	93	96
Aggregation	52	91	60	83
Other (see Definitions – page 3)	89	301	313	77
TOTALS	1,344	1,524	1,449	1,419

Helpdesk Calls Performance

The Helpdesk deals with all online enquiries and calls from Members for all funds that LPPA provide administration services for.

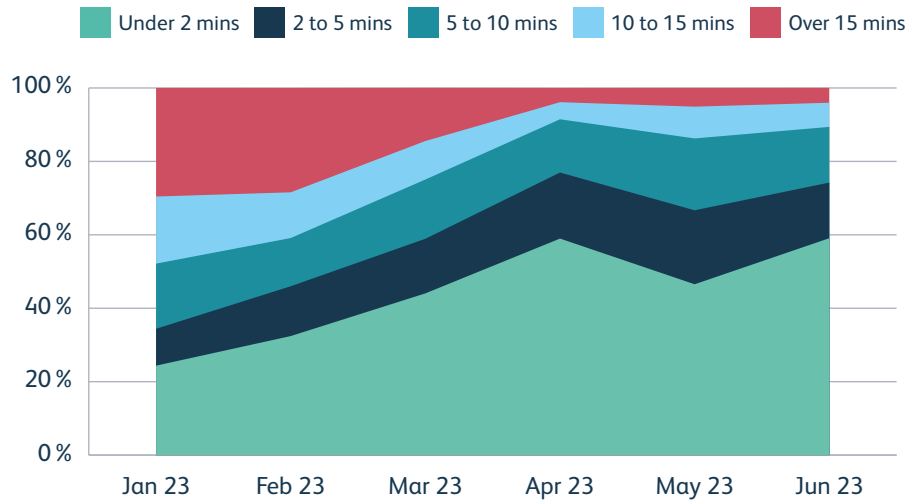
In this section...

- Wait time range
- Calls answered (%)
- Total calls

HELPDESK CALLS PERFORMANCE

WAIT TIME RANGE

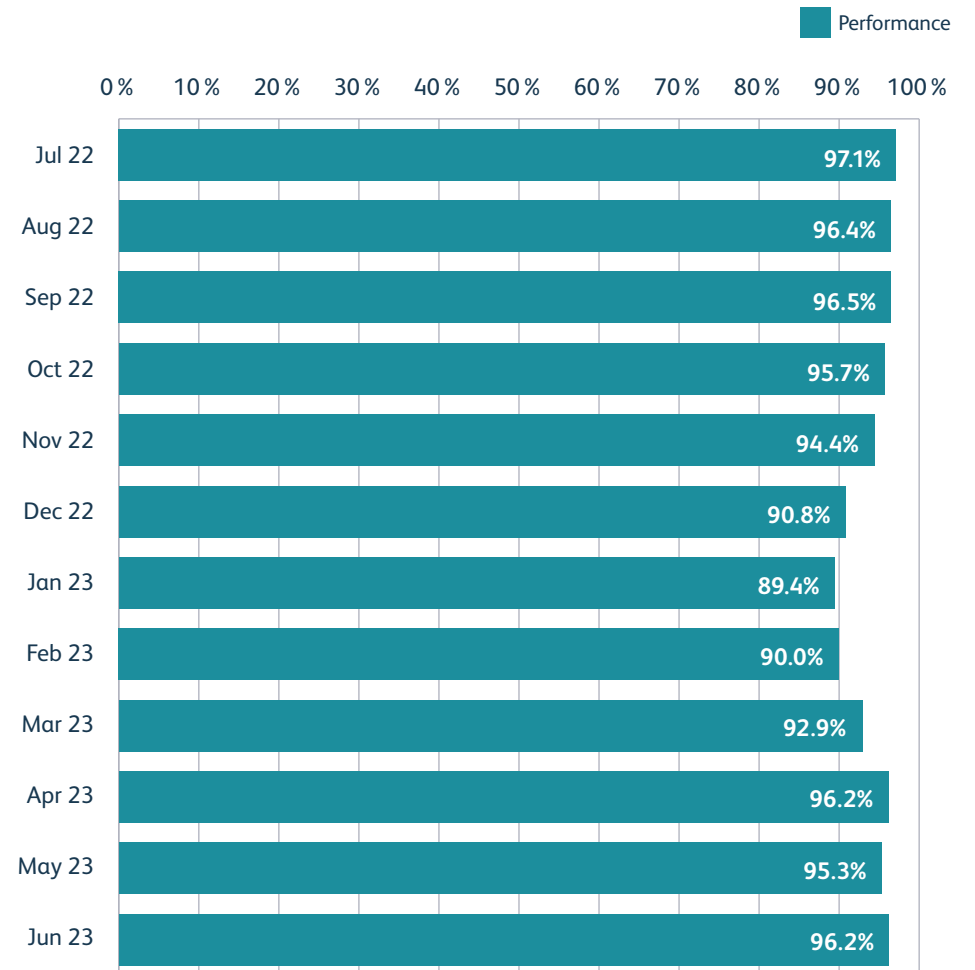
ALL LPPA



	Under 2 mins	2 to 5 mins	5 to 10 mins	10 to 15 mins	Over 15 mins
Jan 23	24.4%	10.0%	17.8%	18.3%	29.6%
Feb 23	32.4%	13.6%	13.1%	12.5%	28.4%
Mar 23	44.1%	14.9%	16.1%	10.5%	14.5%
Apr 23	59.0%	18.0%	14.5%	4.7%	3.9%
May 23	46.5%	20.2%	19.6%	8.7%	5.1%
Jun 23	59.1%	15.2%	15.2%	6.6%	4.1%

CALLS ANSWERED (%)

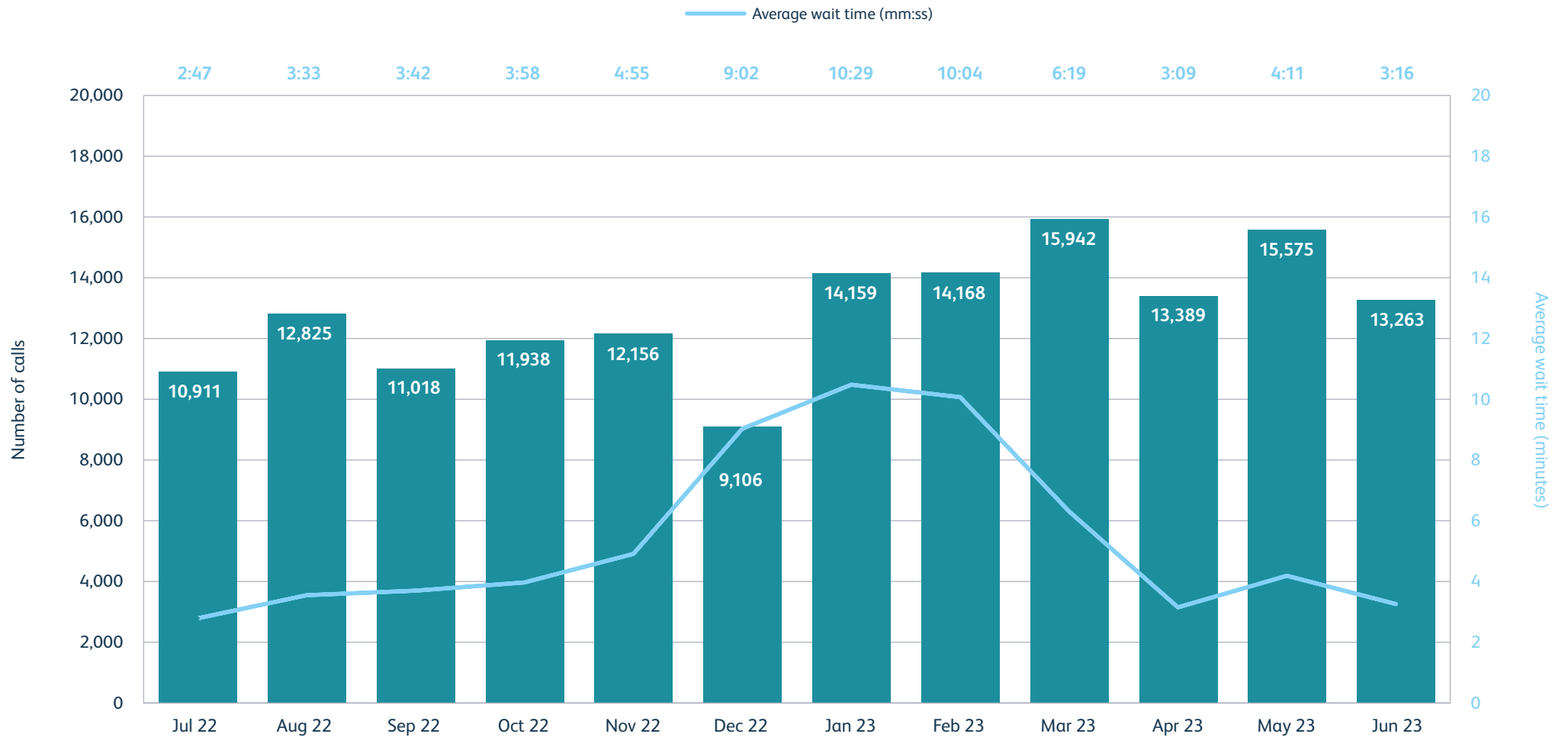
ALL LPPA



HELPDESK CALLS PERFORMANCE

↓ TOTAL CALLS

ALL LPPA



Customer Satisfaction Scores

In this section...

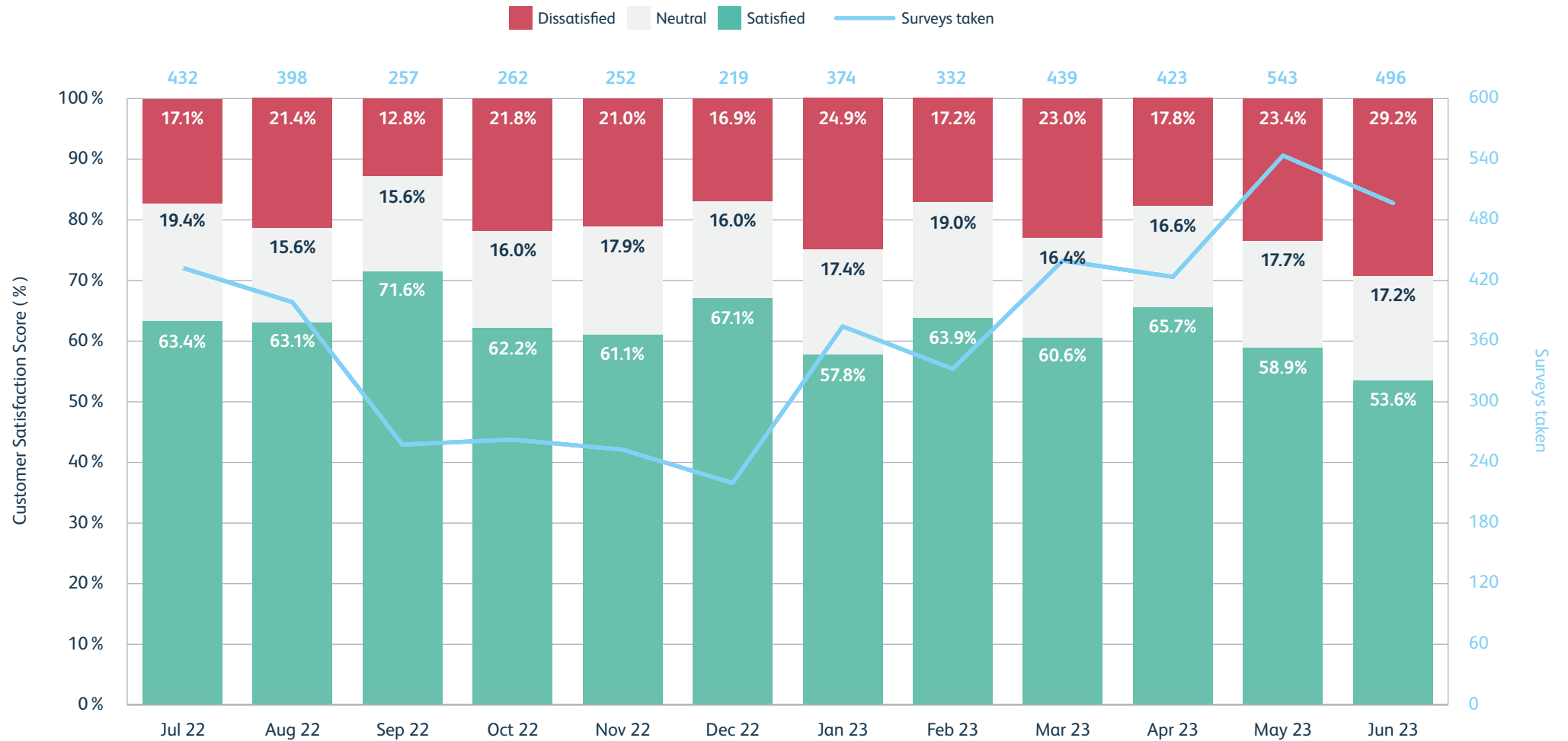
- Helpdesk calls satisfaction
- Retirements

CUSTOMER SATISFACTION SCORES



HELPDESK CALLS SATISFACTION

ALL LPPA

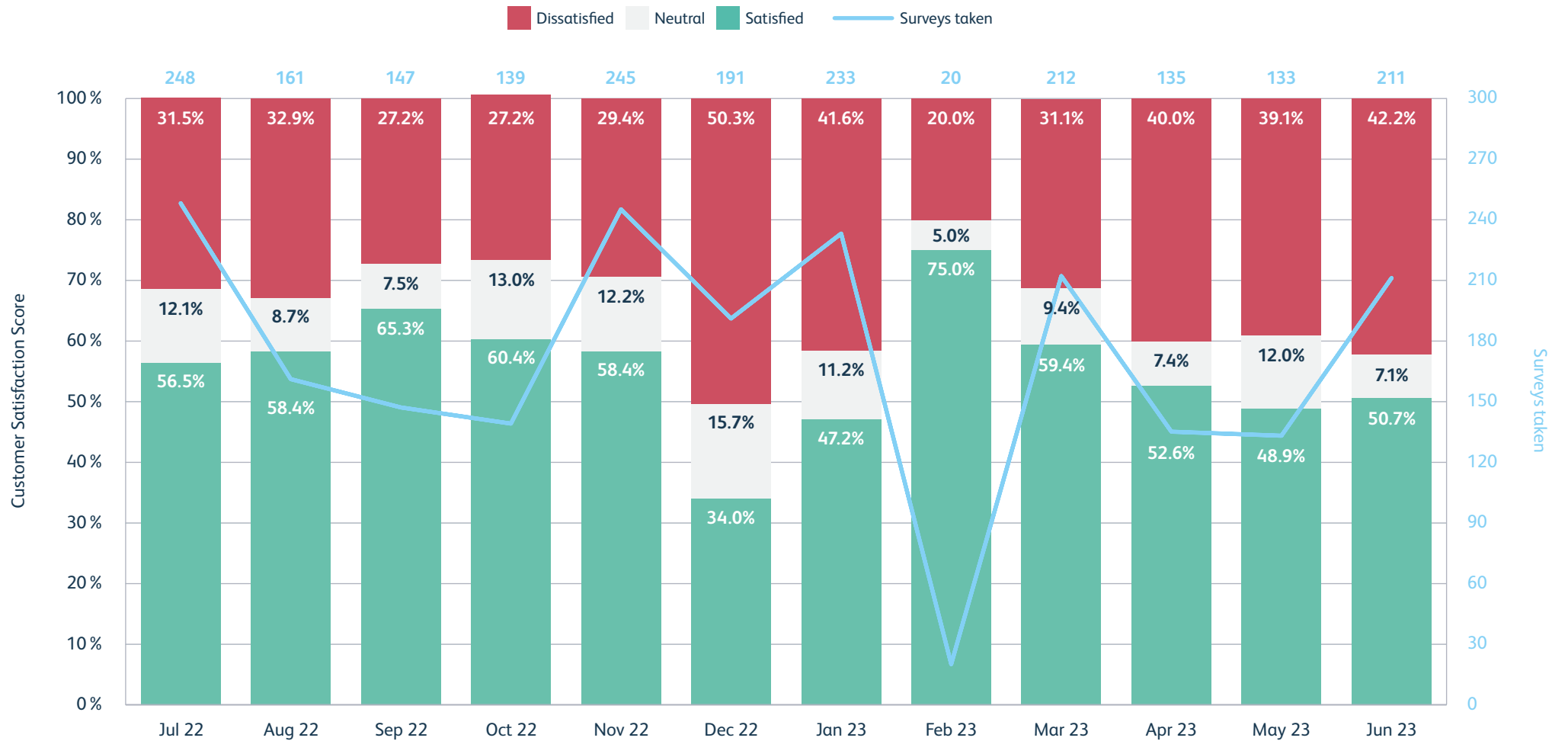


CUSTOMER SATISFACTION SCORES

Please note:

Surveys were paused in February and reinstated in March, following a review of the process. Some surveys were being issued before payment had been made to the member – the timing of the survey has now been updated to correct this.

RETIREMENTS ALL LPPA





Member Online Portal

In this section...

- Total members registered
- Members registered (%)

Please note:

Registration numbers have been slightly understated in previous monthly figures, these have been corrected in this report.

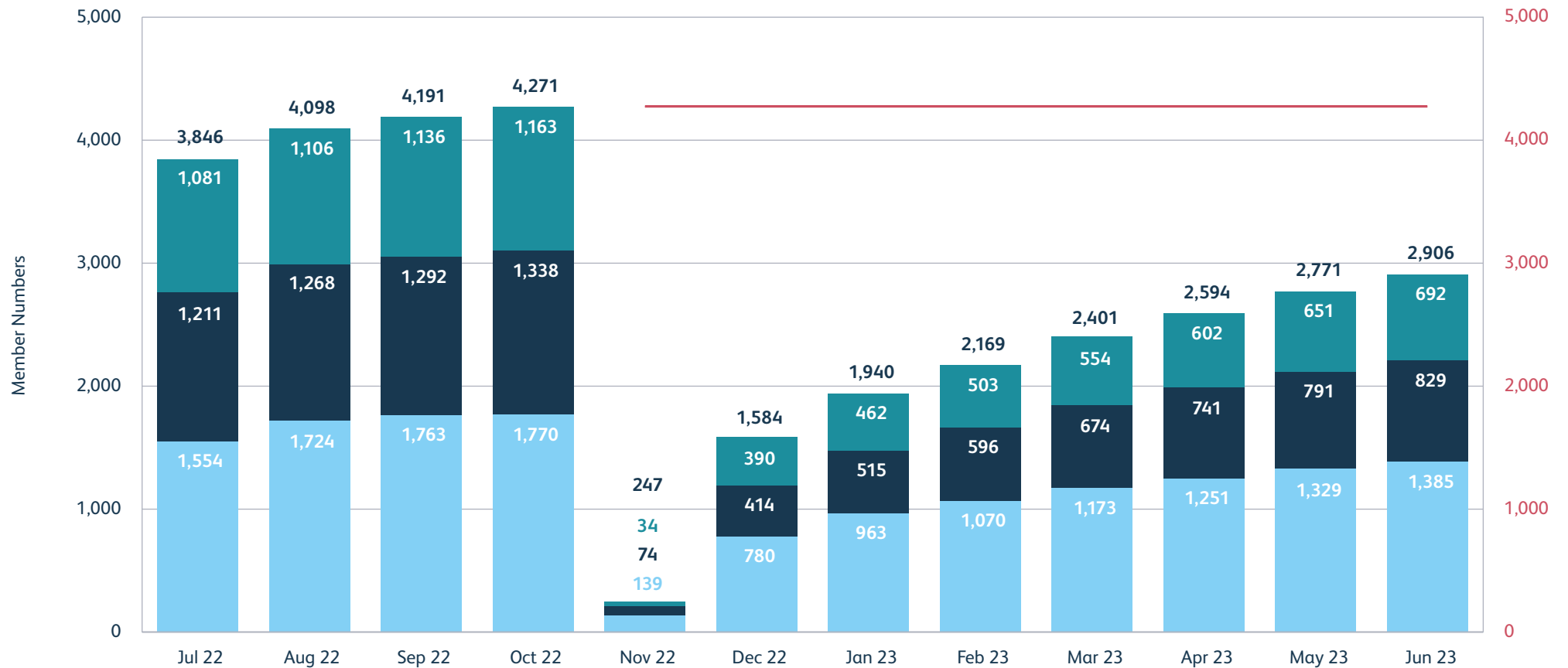


TOTAL MEMBERS REGISTERED

CLIENT SPECIFIC

Active Deferred Pensioner

4,271 (previous My Pension Online registrations as of October 2022)

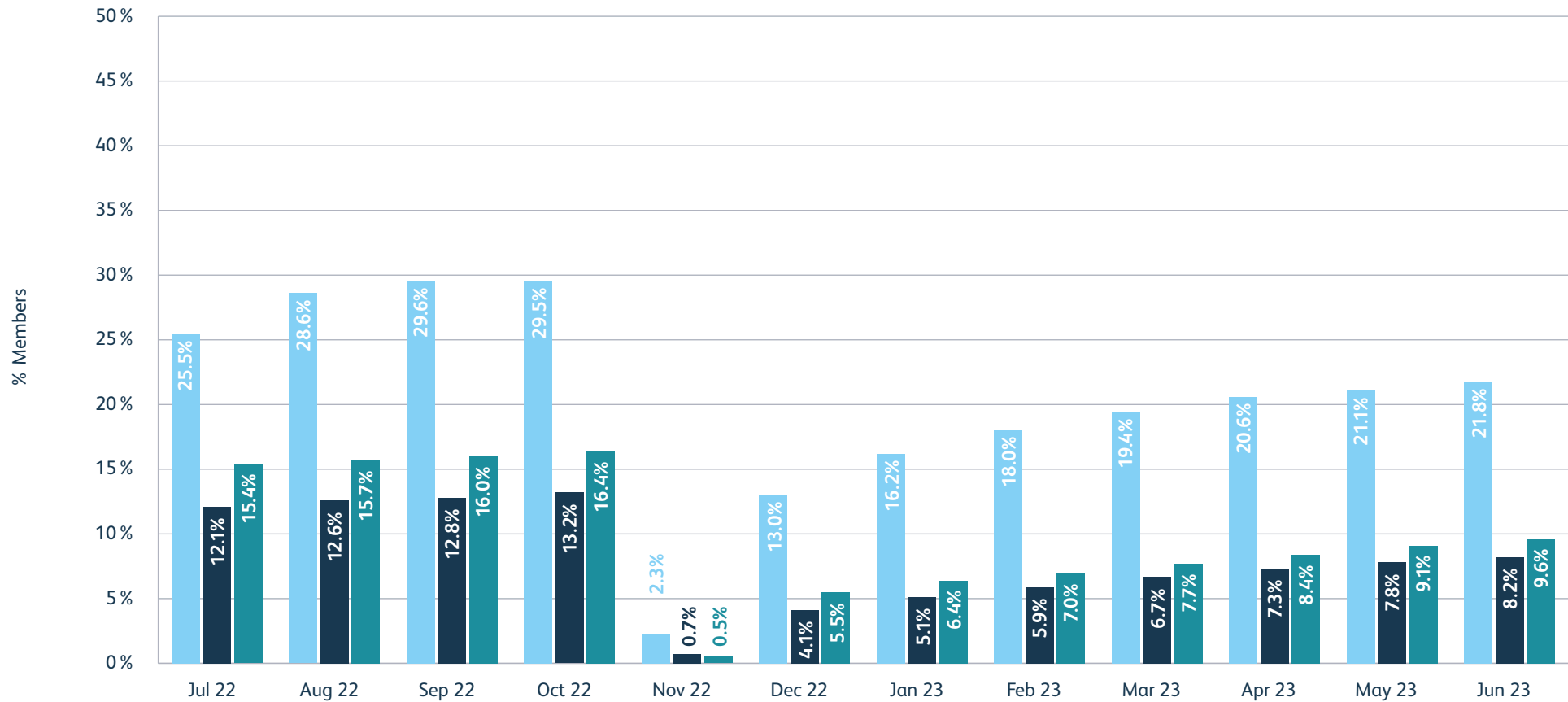




MEMBERS REGISTERED (%)

CLIENT SPECIFIC

Active Deferred Pensioner



Employer Engagement & Member Communication Activity

In this section...

- Delivered
- Scheduled
- Engagement communications (Employers & Members)

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

DELIVERED

ALL LPPA

- Employer training sessions have been delivered with a focus on annual and monthly data returns and navigating the UPM employer portal.
- Automated UPM email notifications went live, confirming to employers when data files have successfully been submitted, and processing has been completed by LPPA.
- Following feedback from employers, improvements have been made to the leaver form in the UPM portal (it is now quicker and more straightforward to complete).
- The online LPPA [retired member newsletter](#) was issued to all email contactable members (and is available to access on the LPPA website), including details on how to access their online P60 in PensionPoint (paper copies issued when requested by members).

LPPA website updates:

1. 2023 Spring Budget updates - update on pension increases
2. P60 information for retired members
3. A new homepage went live on the LPPA Pensions website, to make it easier for members and employers to find relevant information

SCHEDULED

ALL LPPA

- McCloud updates will continue to be added to the LPPA website for members, and with updates expected from the LGA (Local Government Association) and NPCC (National Police Chiefs' Council) in July, proactive letter communications will start to be issued to members.
- The online LPPA Summer newsletter will be published on the website and issued to deferred and active members on email. It will include details of how to view / understand their ABS, which will be available on PensionPoint by 31 August 23.
- As part of our ongoing employer training programme, a new event will focus on employer responsibilities, and useful resources that can be accessed on the LPPA website in support of these pension administration duties.
- Updates and improvements will continue to be made to the UPM employer portal and PensionPoint in Q2 (and ABS notification activity will deliver increased member registrations).

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- Monthly return training sessions were delivered and 1 employer attended
- 2 Brent Pension Fund employers attended year end training
- UPM employer portal Training was delivered with 2 Brent Employers attending



EMPLOYERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
04 Apr	Phoenix Arch School	Year End Training	1
04 Apr	Apleona	Year End Training	1
12 Apr	Phoenix Arch School	UPM Employer Portal	1
12 Apr	Chrysalis Multi Academy Trust	UPM Employer Portal	1
27 Apr	Phoenix Arch School	Submitting Monthly Returns	1



Data Quality

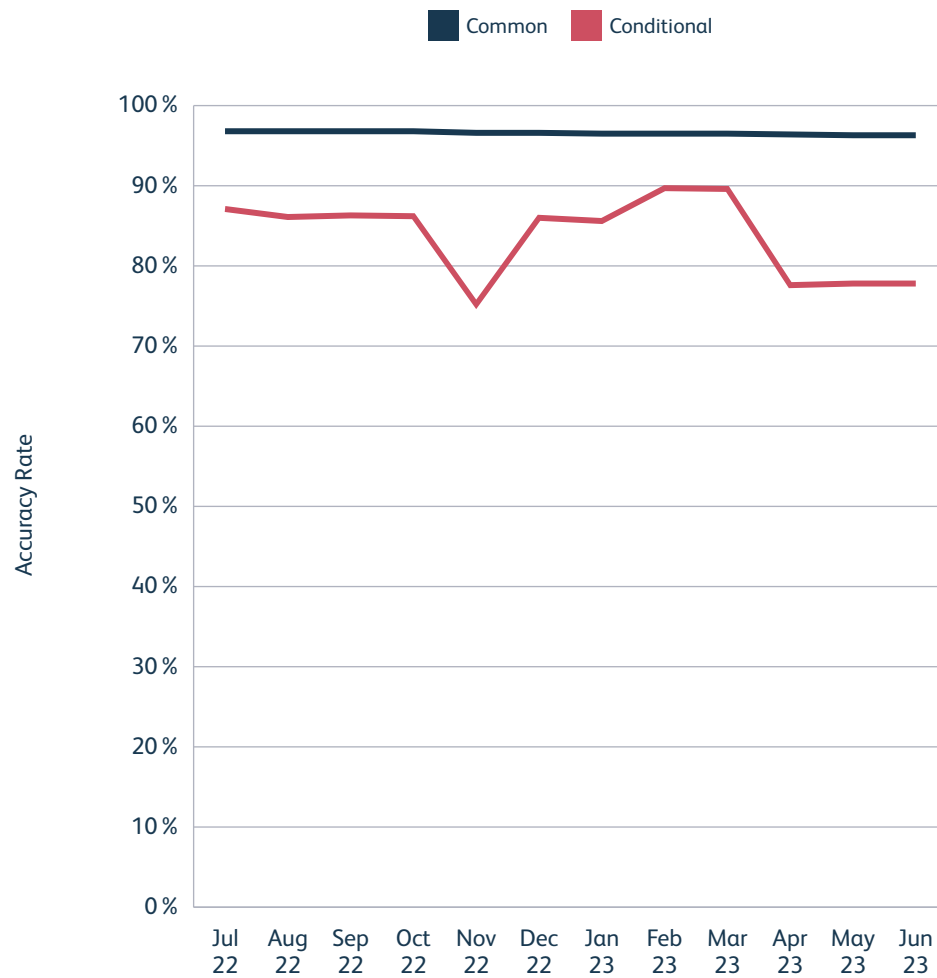
In this section...

- TPR data scores
- Common data
- Conditional data

DATA QUALITY

TPR DATA SCORES

CLIENT SPECIFIC



Please note:

Fall in Q1 is seasonal and directly linked to the Pensions Increase exercise and we expect the score to return to normal values upon the resolution of the PI errors.

	Common (Target 95%)	Conditional (Target 90%)
Jul 22	96.8%	87.1%
Aug 22	96.8%	86.1%
Sep 22	96.8%	86.3%
Oct 22	96.8%	86.2%
Nov 22	96.6%	75.2%
Dec 22	96.6%	86.0%
Jan 23	96.5%	85.6%
Feb 23	96.5%	89.7%
Mar 23	96.5%	89.6%
Apr 23	96.4%	77.6%
May 23	96.3%	77.8%
Jun 23	96.3%	77.8%

END OF QUARTER DATA QUALITY

(TPR SCORES)



COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	3	79	26
Duplicate effective date in status history	1	13	13
Gender is not Male or Female	8	0	0
Duplicate entries in status history	10	35	24
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	10	1	4
Missing Surname	1	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	4	0	0
No entry in the status history	2	0	0
Last entry in status history does not match current status	19	5	3
Member has no address	61	524	31
Missing Forename(s)	1	6	1
Missing State Retirement Date	8	0	0
Missing postcode	64	565	58
Missing Date Joined Pensionable Service	0	0	0
Total Fails	192	1,228	160
Individual Fails	110	666	107
Total Members	6,366	10,143	7,185
Accuracy Rate	98.3%	93.4%	98.5%
Total accuracy rate	96.3%		



CONDITIONAL DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	102
AVC's/Additional Contributions	25
Deferred Benefits	3
Tranches (DB)	711
Gross Pension (Pensioners)	54
Tranches (Pensioners)	2,978
Gross Pension (Dependants)	83
Tranches (Dependants)	80
Date of Leaving	216
Date Joined Scheme	220
Employer Details	3
Salary	200
Crystallisation	336
Annual Allowance	159
LTA Factors	103
Date Contracted Out	5
Pre-88 GMP	703
Post-88 GMP	544
Total Fails	6,525
Individual Fails	5,265
Total Members	23,694
Accuracy Rate	77.8%

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