

OUR



TO BE
THE PENSION
ADMINISTRATOR
OF CHOICE
TO THE
PUBLIC SECTOR

LPP

Local Pensions Partnership
Administration

Brent Pension Fund

Quarterly Administration Report

1st October - 31st December 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 10

Casework Performance - All Cases

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.

Page 11

Casework Performance - Standard

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 12

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 14 & 15

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 20 & 21

Member Online Portal

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

Page 28

Common/Scheme Specific Data Fails

The Pensions 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 Scheme Specific 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 Scheme Specific 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		✓										
P60s and Newsletter to Pensioners		✓										
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 Q3 2023/24 (October – December 2023)

Casework and Helpdesk performance metrics continue to trend in the right direction.

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.

- Pension Saving Statements
- HMRC Scheme Returns

Casework SLA performance

Overall performance against SLAs is above the targeted 95% and has been consistently achieved since September 2023. Performance is above or close to the 95% target in the key areas of Bereavements and Retirements.

Satisfaction scores

Helpdesk and Retirement satisfaction scores are now reported at client level as a rolling 12 month view. Moving away from the reporting across all LPPA clients will result in a reduced number of surveys completed and will affect the visual of the graphs but provides a clear view of the satisfaction in respect of your members.

Pensions Helpdesk

Helpdesk performance for average call wait time and number of answered calls is now reported at a client level, abandoned rate remains across all LPPA clients as we do not know which client a member was calling from until after a call has been accepted.



Fund Membership

In this section...

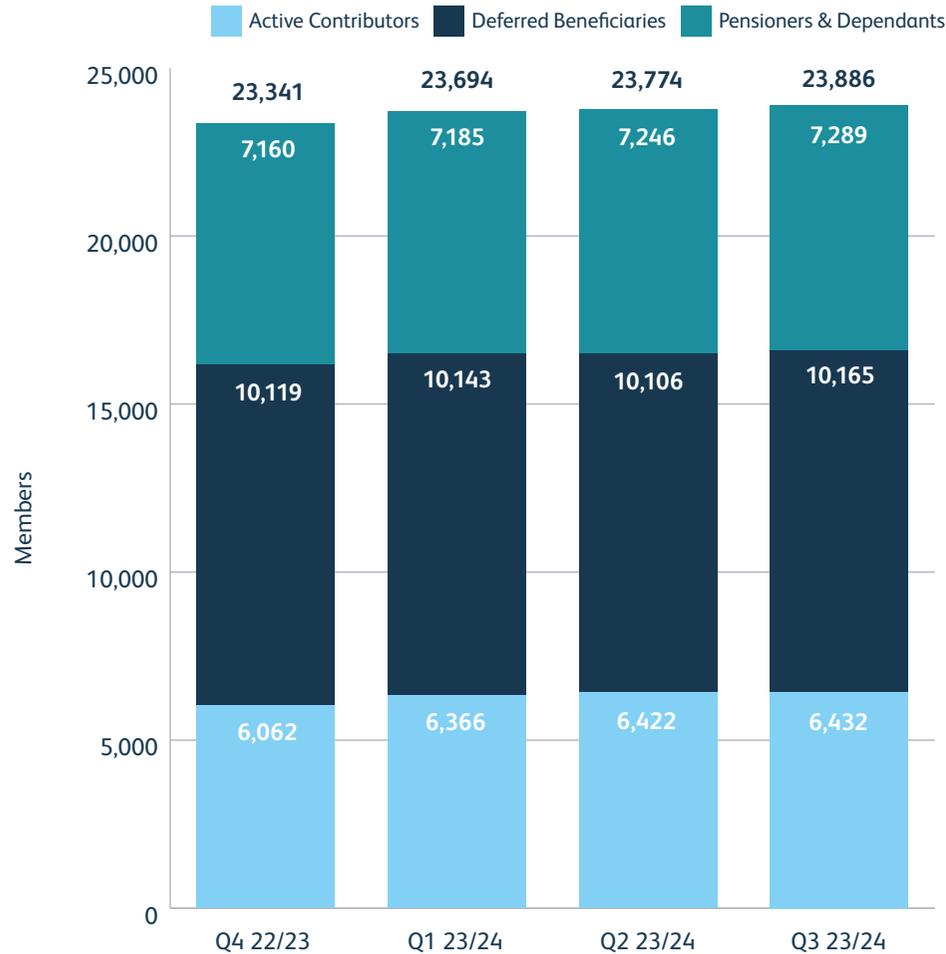
- Total fund membership
- Current age demographic

TOTAL FUND MEMBERSHIP



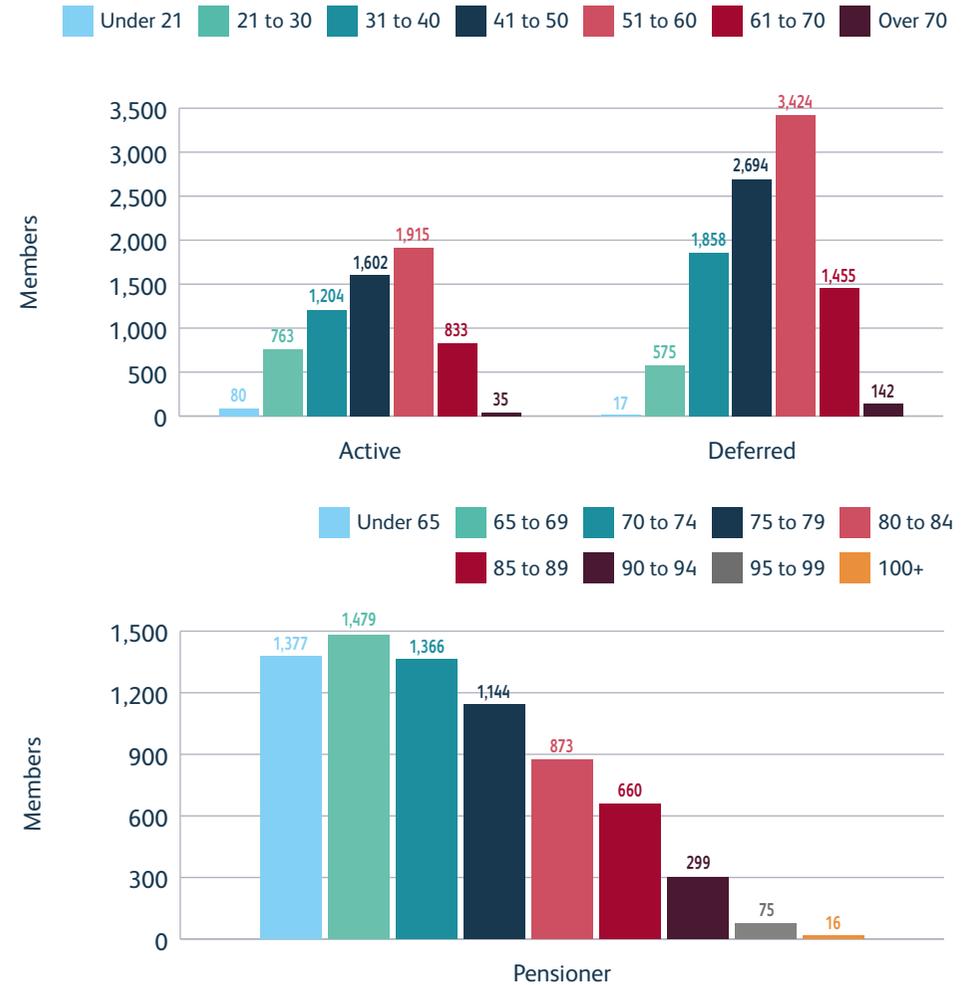
TOTAL FUND MEMBERSHIP

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

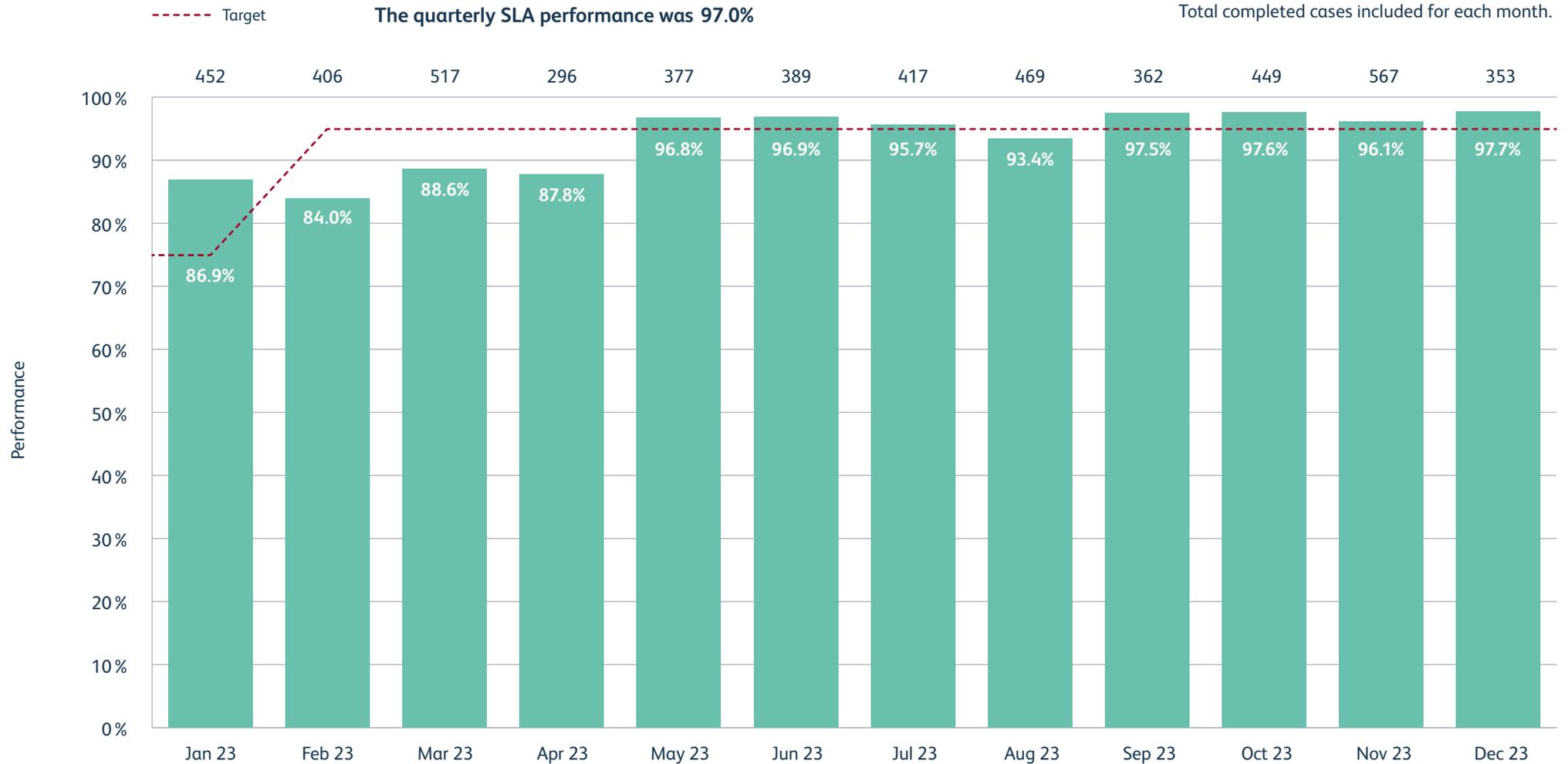
Please note:

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 01/10/23	Received (Inbound)	Completed (Outbound)	Outstanding as of 31/12/23
New Starters	1	29	30	-
Transfers In	219	83	120	182
Transfers Out	234	152	133	253
Estimates	33	45	55	23
Deferred Benefits	267	246	245	268
Retirements - Deferred	249	212	234	227
Retirements - Active	60	107	106	61
Refunds	77	167	174	70
Deaths	217	194	169	242
Correspondence	104	135	137	102
Aggregation	85	118	98	105
Other (see Definitions – page 3)	71	332	347	56
TOTALS	1,617	1,820	1,848	1,589

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

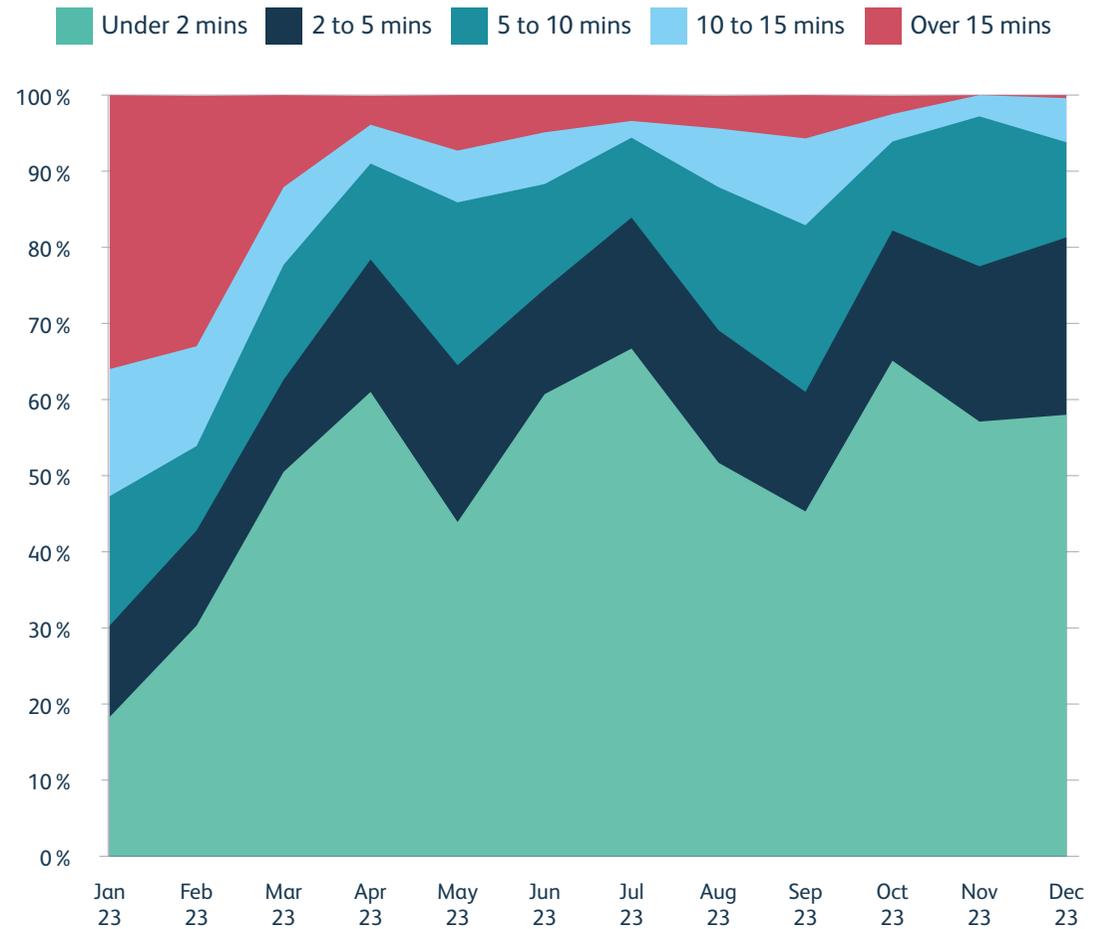
HELPDESK CALLS PERFORMANCE



WAIT TIME RANGE

CLIENT SPECIFIC

	Under 2 mins	2 to 5 mins	5 to 10 mins	10 to 15 mins	Over 15 mins
Jan 23	18.3%	12.0%	17.0%	16.7%	36.0%
Feb 23	30.3%	12.5%	11.1%	13.1%	32.9%
Mar 23	50.5%	12.1%	15.1%	10.2%	12.1%
Apr 23	61.0%	17.4%	12.6%	5.1%	3.8%
May 23	43.9%	20.6%	21.4%	6.8%	7.3%
Jun 23	60.7%	13.8%	13.8%	6.8%	4.9%
Jul 23	66.7%	17.2%	10.5%	2.2%	3.4%
Aug 23	51.7%	17.4%	18.8%	7.7%	4.3%
Sep 23	45.3%	15.7%	21.9%	11.4%	5.7%
Oct 23	65.1%	17.1%	11.7%	3.6%	2.4%
Nov 23	57.1%	20.4%	19.7%	2.8%	0.0%
Dec 23	58.0%	23.3%	12.5%	5.8%	0.4%



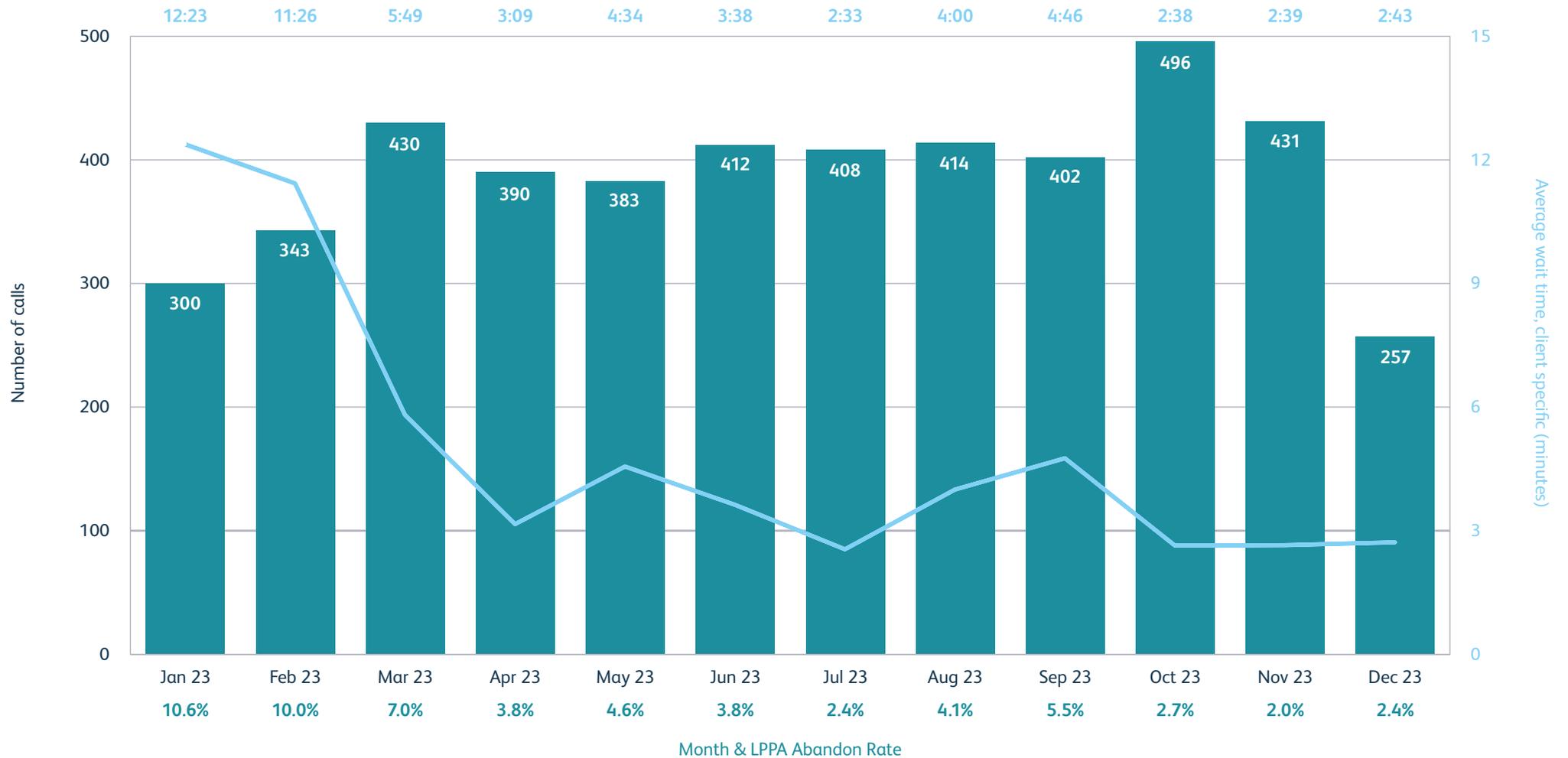
HELPDESK CALLS PERFORMANCE



CALLS ANSWERED

CLIENT SPECIFIC

— Average wait time (mm:ss)



Customer Satisfaction Scores

In this section...

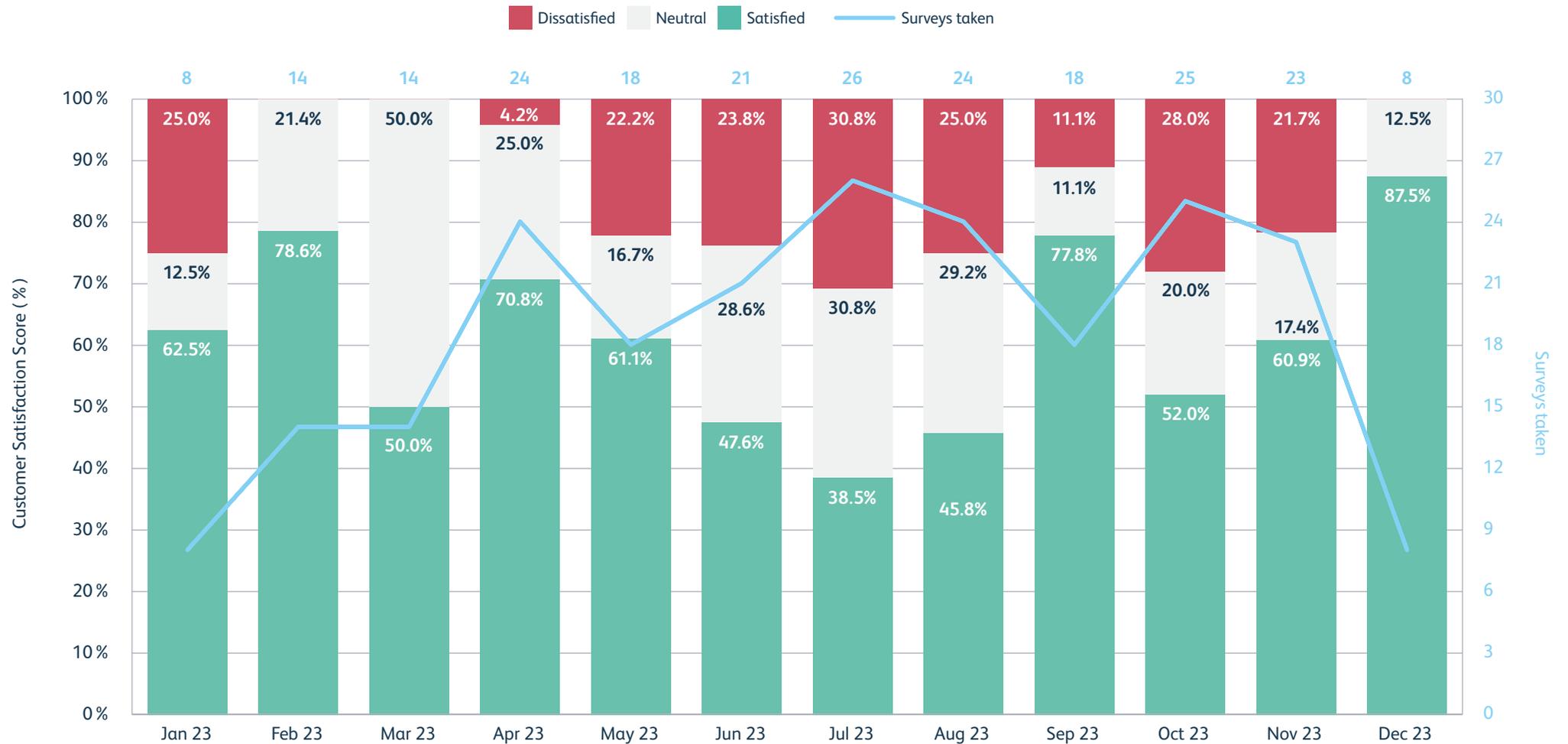
- Helpdesk calls satisfaction
- Retirements

CUSTOMER SATISFACTION SCORES



HELPDESK CALLS SATISFACTION

CLIENT SPECIFIC

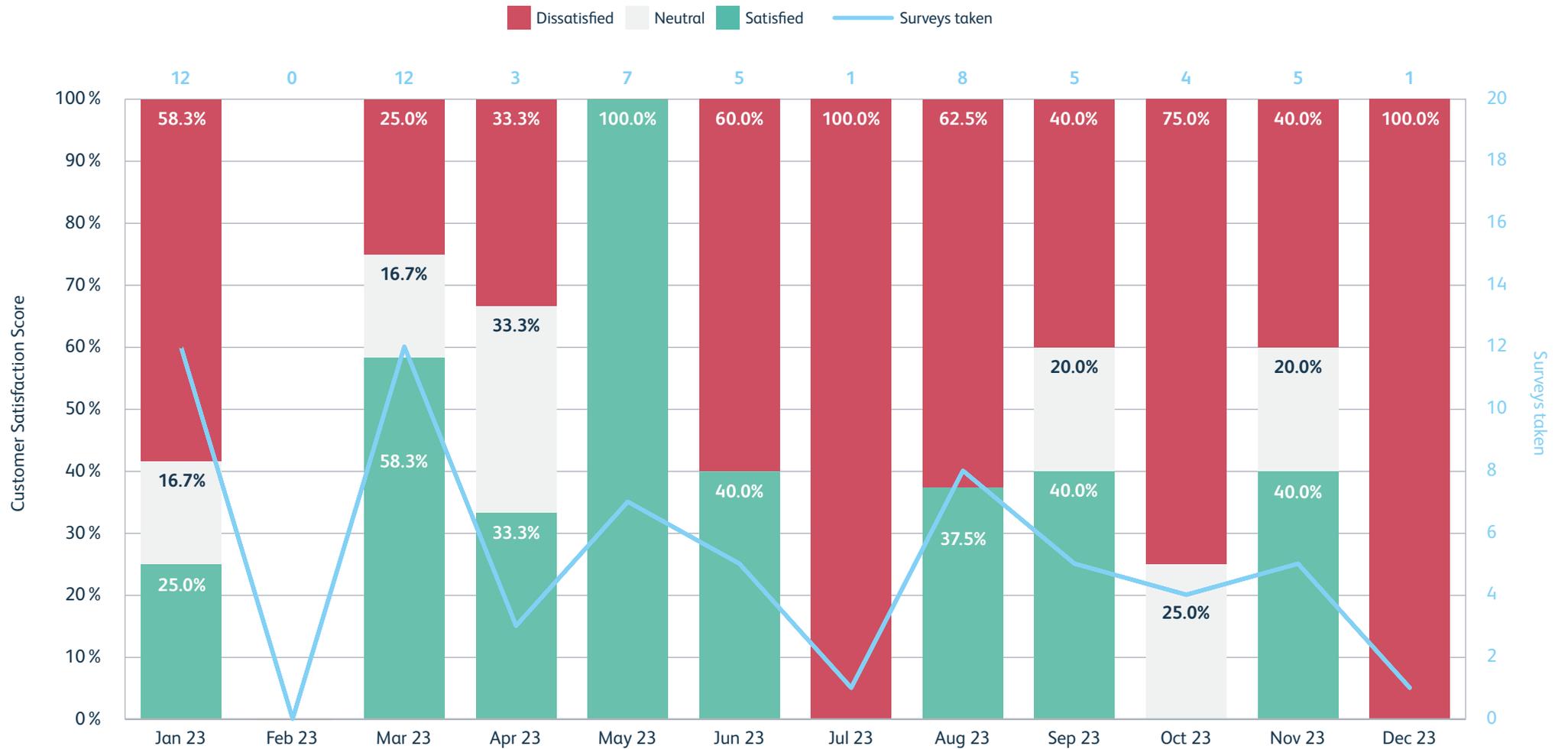


CUSTOMER SATISFACTION SCORES

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 CLIENT SPECIFIC





Member Online Portal

In this section...

- Total members registered
- Members registered (%)

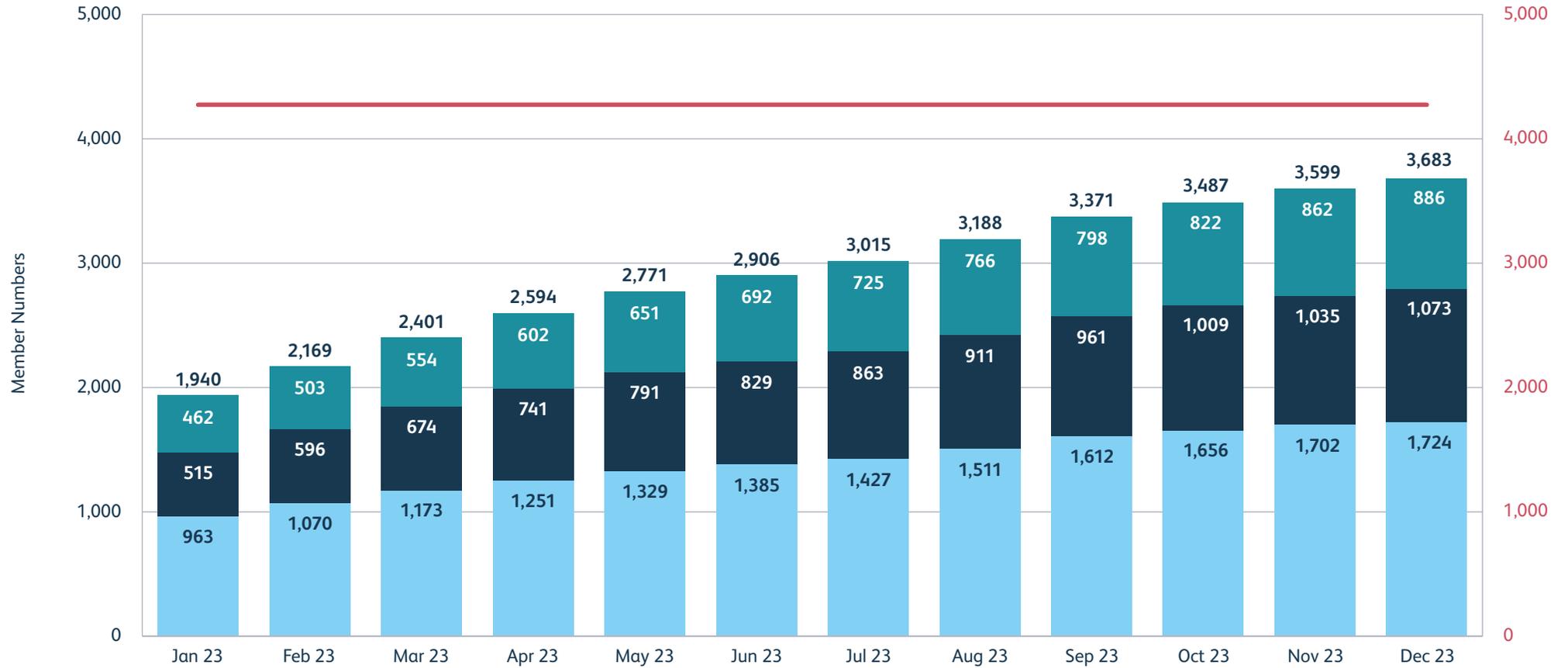


TOTAL MEMBERS REGISTERED

CLIENT SPECIFIC

Active Deferred Pensioner

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

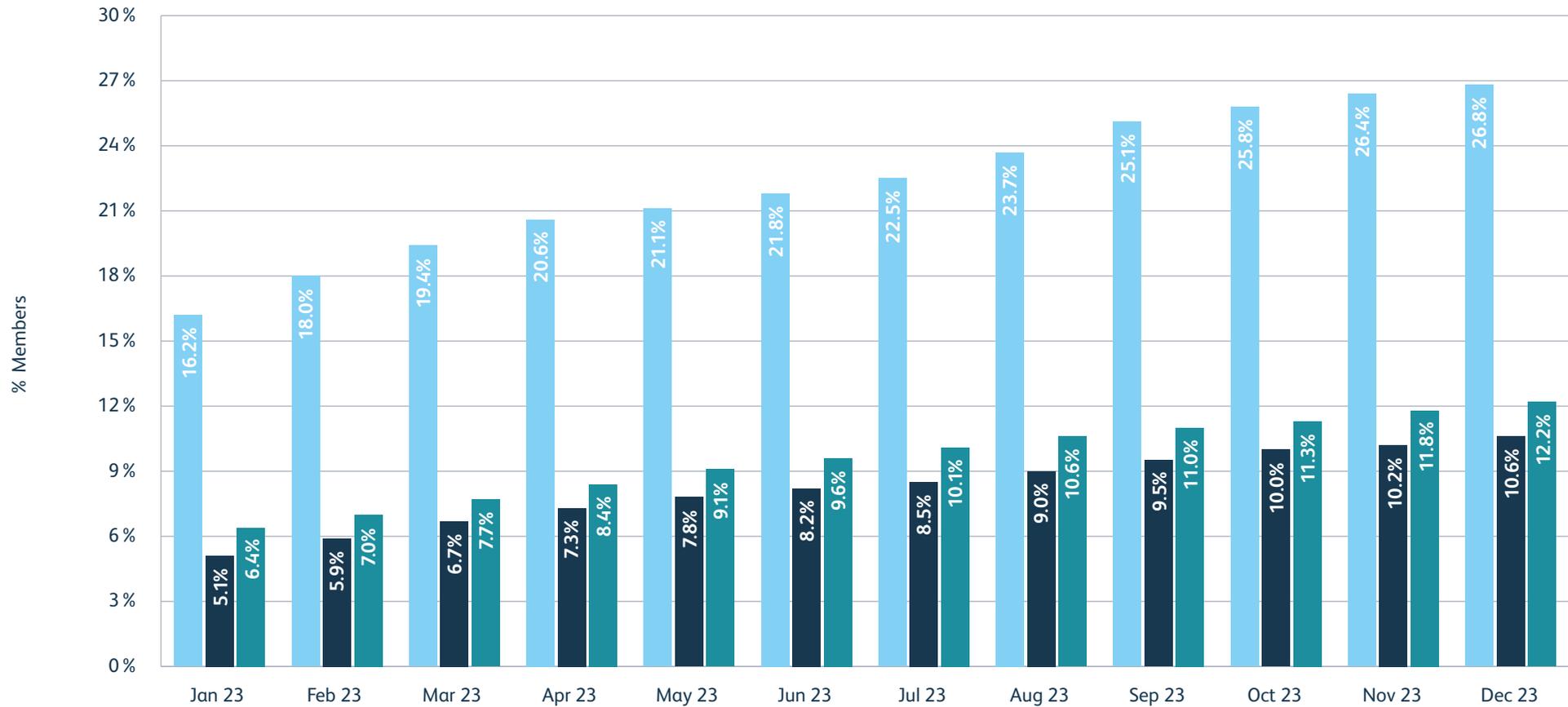




MEMBERS REGISTERED (%)

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

- The [member contact form](#) was improved to assist member self-service requests for information contained on the LPPA website – this has resulted in more member visits to retirement and PensionPoint pages (FAQ's, how to videos etc).
- Monthly return files - reminder [emails](#) and telephone calls to non-submitting employers were issued / actioned, to ensure that support is provided, as well as highlighting the impact if files are not up-to-date, ready for the production of ABS documents in 2024.
- An employer email promoting [Get Online week](#) was issued.
- A McCloud (LGPS) client round table was facilitated by LPPA to provide a business (project) and communications update, together with a discussion on employer data requirements, followed by a Q&A.
- The [Employer toolkit](#) page was updated (simplified) on the LPPA website
- An [email invite](#) was issued promoting the virtual LPPA Employer Forum (23 November 23)
- [Pension Pulse](#) (newsletter) was issued to employers and focused on the LPPA Employer Forum (including a link to the session recording), the employer toolkit and a reminder that member estimates can be generated in the employer portal.

- Several new resource pages were added to the LPPA website:

[Increasing your pension benefits](#) - provides members with information on taking out an AVC, APC or added pension.

[Age discrimination remedy pages](#) – explaining how members are affected by the McCloud judgement.

New [Forms, documents and scheme information](#) page added.

SCHEDULED

ALL LPPA

- The LPPA Communications team are working on planned improvements to the retirement section of the LPPA website.
- Communications will be issued to employers to ensure that the 'reasons for leaving' are as specified (for leavers included in the monthly return file), to help facilitate a move towards bulk submission of leavers later in the year.
- Communications are planned to employers to highlight the importance of 'on-time retirement notifications' to LPPA, and how the leaver process can support them to ensure the member retirement experience is enhanced.
- Email communications and telephone calls will continue to non-submitting (monthly return file) employers, and updates will be provided to clients.

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- 2 Virtual employer visits were held
- 2 employers attended LGPS Scheme Essentials Training
- UPM employer portal training was delivered with 1 employer attending
- Employer Responsibilities training was delivered with 1 employer attending
- UPM Employer Portal training was delivered with 1 employer attending
- 11 people from Brent employers attended our Employer Forum
- Monthly member sessions were delivered, with 3 Brent Fund members attending the Making Sense of your Pension sessions and 2 attending Making Sense of your Retirement sessions



EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

EMPLOYERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
04 Oct	London Borough of Brent	Submitting Monthly Returns	1
10 Oct	Michael Sobbell Sinai School	Employer Responsibilities	1
17 Oct	London Borough of Brent	UPM Employer Portal	1
25 Oct	Lyon Park	Virtual Visit	1
30 Oct	Islamia Primary	Virtual Visit	1
21	The Diocese of Westminster Academy Trust	LGPS Scheme Essentials	1
Nov	Crest and Braincroft	LGPS Scheme Essentials	1
21 Nov	Barham Primary School	Employer Forum	1
23 Nov	Brent	Employer Forum	2
23 Nov	Brent, Newman Catholic College, College Green	Employer Forum	1
23 Nov	Chalkhill Primary School	Employer Forum	1
23 Nov	Chrysalis Multi Academy Trust - Claremont High School and Sudbury Primary School	Employer Forum	1
23 Nov	Crest and Braincroft	Employer Forum	1
23 Nov	Curzon Crescent Nursery School and Fawood Children's Centre	Employer Forum	1
23 Nov	Kingsbury High School	Employer Forum	1
23 Nov	London Borough of Brent	Employer Forum	1
23 Nov	Michael Sobbell Sinai School	Employer Forum	1
30 Nov	Crest and Braincroft	Scheme Leavers - UPM employer portal	1

MEMBERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
23 Oct	All Brent Employers	Making sense of retirement	1
24 Oct	All Brent Employers	Making sense of your pension	1
16 Nov	All Brent Employers	Making sense of your pension	2
05 Dec	All Brent Employers	Making sense of retirement	1



Data Quality

In this section...

- TPR data scores
- Common data
- Scheme specific data

DATA QUALITY

TPR DATA SCORES

CLIENT SPECIFIC



	Common (Target 95%)	Scheme Specific (Target 90%)
Jan 23	96.52%	85.62%
Feb 23	96.47%	89.71%
Mar 23	96.45%	89.63%
Apr 23	96.43%	77.64%
May 23	96.33%	77.75%
Jun 23	96.27%	77.78%
Jul 23	96.27%	77.78%
Aug 23	96.26%	69.47%
Sep 23	96.30%	72.10%
Oct 23	96.33%	74.71%
Nov 23	96.27%	74.84%
Dec 23	96.24%	74.87%

END OF QUARTER DATA QUALITY

(TPR SCORES)

COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	2	79	30
Duplicate effective date in status history	1	21	11
Gender is not Male or Female	13	0	0
Duplicate entries in status history	14	45	23
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	13	1	4
Missing Surname	1	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	8	0	0
No entry in the status history	2	0	0
Last entry in status history does not match current status	29	6	5
Member has no address	44	523	33
Missing Forename(s)	1	6	1
Missing State Retirement Date	13	0	0
Missing postcode	49	560	52
Missing Date Joined Pensionable Service	0	0	0
Total Fails	190	1241	159
Individual Fails	116	674	108
Total Members	6432	10165	7289
Accuracy Rate	98.2%	93.4%	98.5%
Total accuracy rate			96.2%



SCHEME SPECIFIC DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	98
AVCs/Additional Contributions	23
Deferred Benefits	4
Tranches (DB)	704
Gross Pension (Pensioners)	50
Tranches (Pensioners)	2,970
Gross Pension (Dependants)	78
Tranches (Dependants)	88
Date of Leaving	134
Date Joined Scheme	140
Employer Details	3
Salary	292
Crystallisation	154
CARE Data	1,021
CARE Revaluation	1
Annual Allowance	650
LTA Factors	115
Date Contracted Out	5
Pre-88 GMP	679
Post-88 GMP	551
Total Fails	7,760
Individual Fails	6,002
Total Members	23,886
Accuracy Rate	74.9%

LPP

Local Pensions Partnership
Administration