

# LPP

Local Pensions Partnership  
Administration



Brent Pension Fund

## Quarterly Administration Report

1st April – 30th June 2021

[lppapensions.co.uk](http://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 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 11 & 12

## **Casework Performance Against SLA**

The category of 'Other' on this page covers cases including, but not limited 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).

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## **Elapsed Times**

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

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## **Retirements**

Shows how quickly pension and lump sum payments are paid to Members – distinguishing between late/early notifications and Members with AVC's. Individual tables provide further detail.

Page 18-20

## **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. The Annual Calls answered performance figures are not Client specific (as we are unable to measure abandoned calls by Client).

A 'resolved' call or email requires no further action, as the enquiry has been answered in full. Any that are 'unresolved' will require an action of either a case or chase case to be created, or documents that need to be added to an existing case.

As the needs of our business, Clients and Members change, we adapt our reporting to suit the current trends and ensure sight of common topics. For this reason it is necessary to update and add new topics in the reason for calls. To accommodate the multitude of reasons we have created a "Other" category which includes (but not limited to) 'Information Only', 'Website', 'Resend Documents'.

Page 22 & 23

## **Customer Satisfaction Scores**

The Helpdesk satisfaction scores (telephone 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 25

## **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 26

## **My Pension Online (MPO)**

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

Page 31 & 32

## **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 38 & 39

## **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.

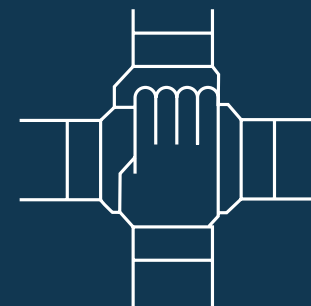
Within LPPA, our values play a fundamental role in guiding our behaviour as we grow our pensions services business and share the benefits with our Clients.



# Annual Plan 2021/22

✓ 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			✓		📅				📅			📅

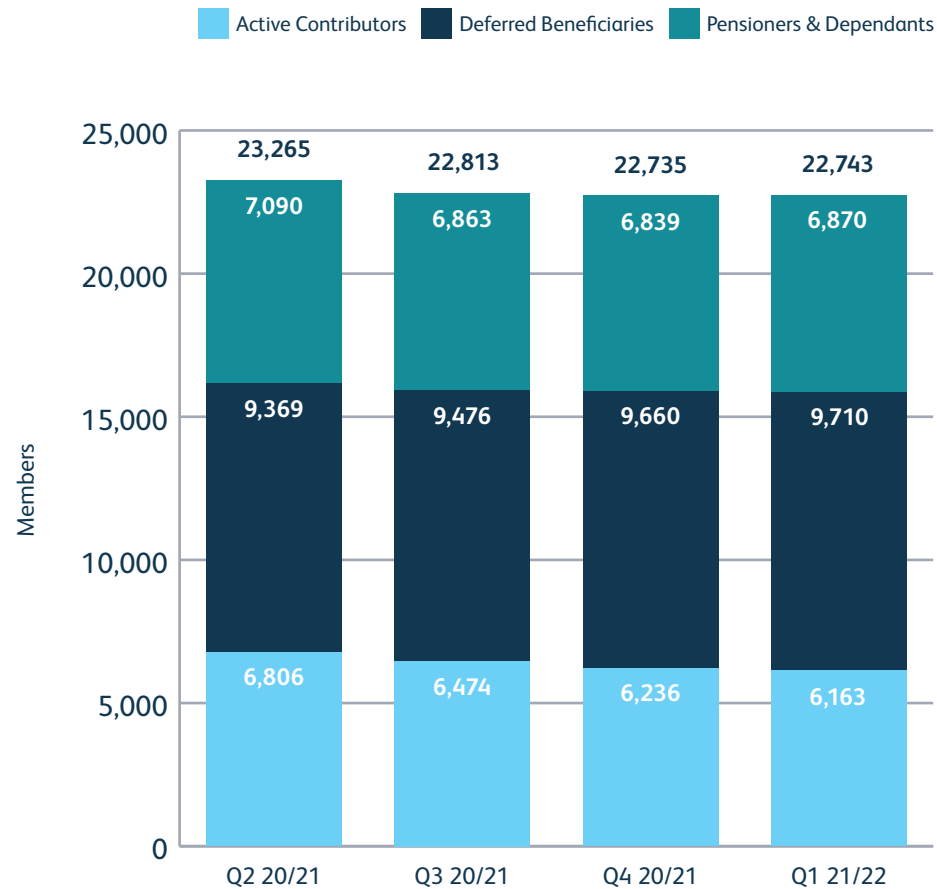


Working Together

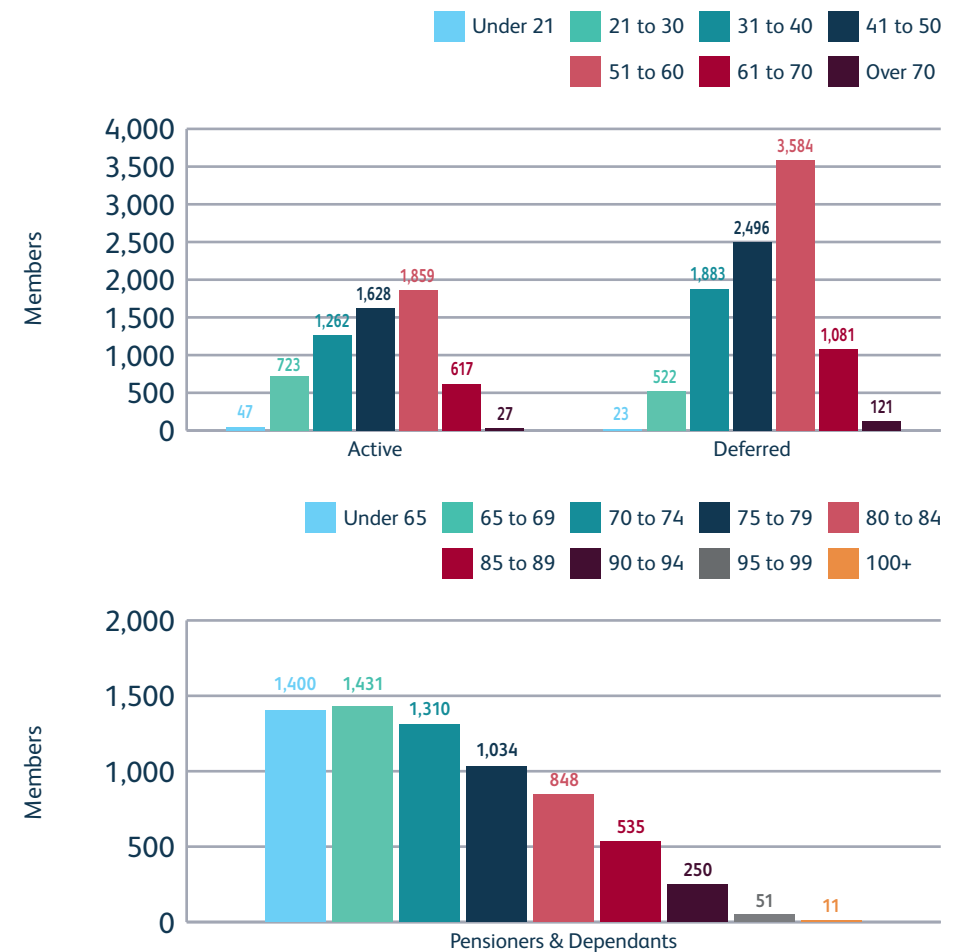
# Fund Membership

# Fund Membership

## TOTAL FUND MEMBERSHIP



## CURRENT AGE DEMOGRAPHIC



# Fund Membership

## LEAVERS

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

Total Current Leavers	Received*	Pending**
1,150	151	999

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

\*\* *Awaiting information from Employer*



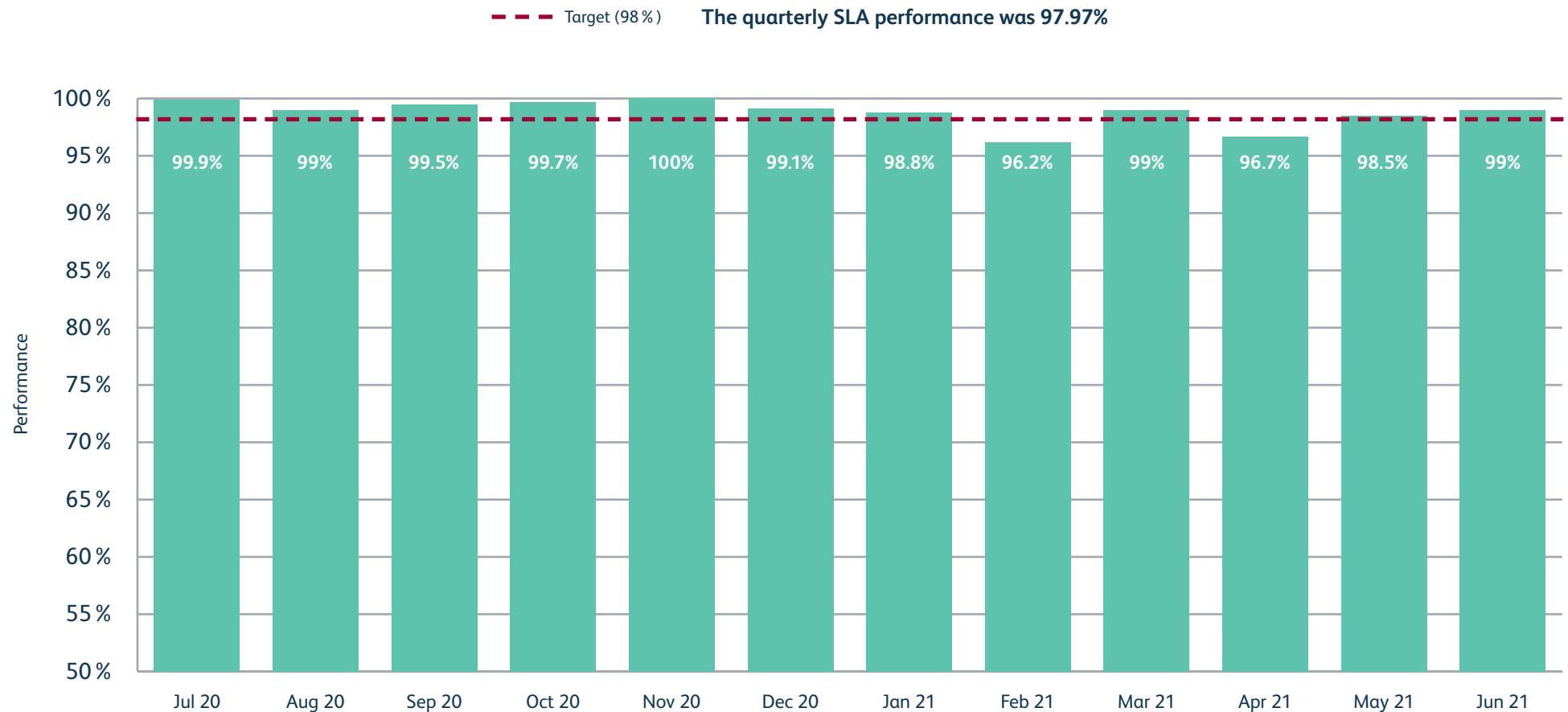


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# Casework Performance Against SLA

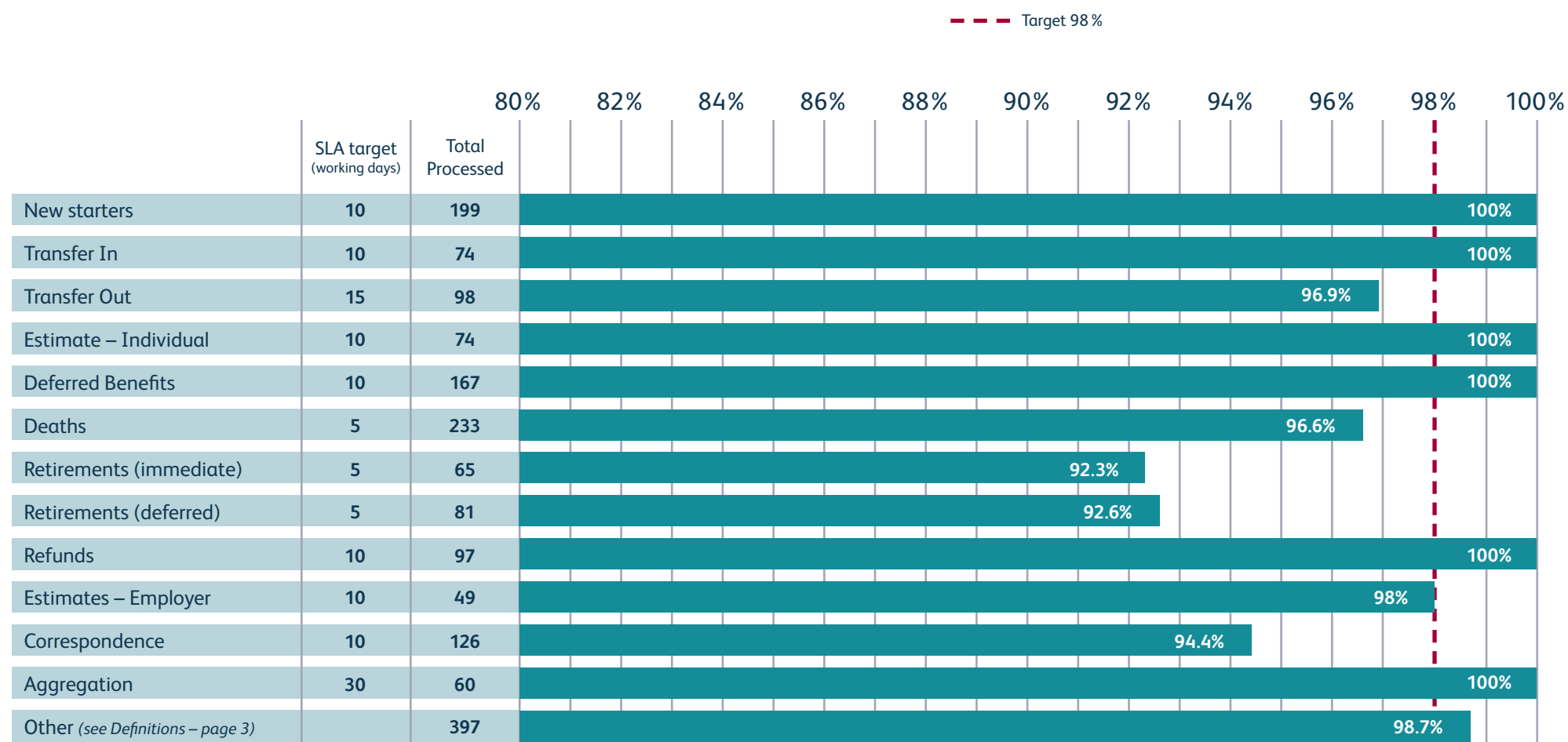
# Casework Performance Against SLA

## PERFORMANCE – ALL CASES



# Casework Performance Against SLA

## PERFORMANCE STANDARD



# Casework Performance Against SLA

## ONGOING CASEWORK AT THE END OF THE REPORTING QUARTER

	Brought Forward at 01/04/21	Completed	Received	Outstanding as of 30/06/21
New Starters	29	199	213	43
Transfer In	145	74	91	162
Transfer Out	80	98	105	87
Estimate - Individual	21	74	69	16
Deferred Benefits	127	167	205	165
Deaths	369	233	137	273
Retirements (Immediate)*	89	83	44	50
Retirements (Deferred)*	161	169	117	109
Refunds	34	97	132	69
Estimates - Employer	9	49	51	11
Correspondence	24	126	125	23
Aggregation	47	60	53	40
Other (see Definitions – page 3)	229	397	348	180
<b>TOTALS</b>	<b>1,364</b>	<b>1,826</b>	<b>1,690</b>	<b>1,228</b>

\* In Q4 20/21, we trialled a new way of prioritising retirement cases. This resulted in the retirement process being split out into it's two component parts 1) the options stage 2) the payment stage. The number of completed cases reported in this table may therefore vary to the number of retirements processed on page 11, which are reportable against the SLA. We have since re-designed the workflow so that the two component parts of the process can be handled under the one case type.

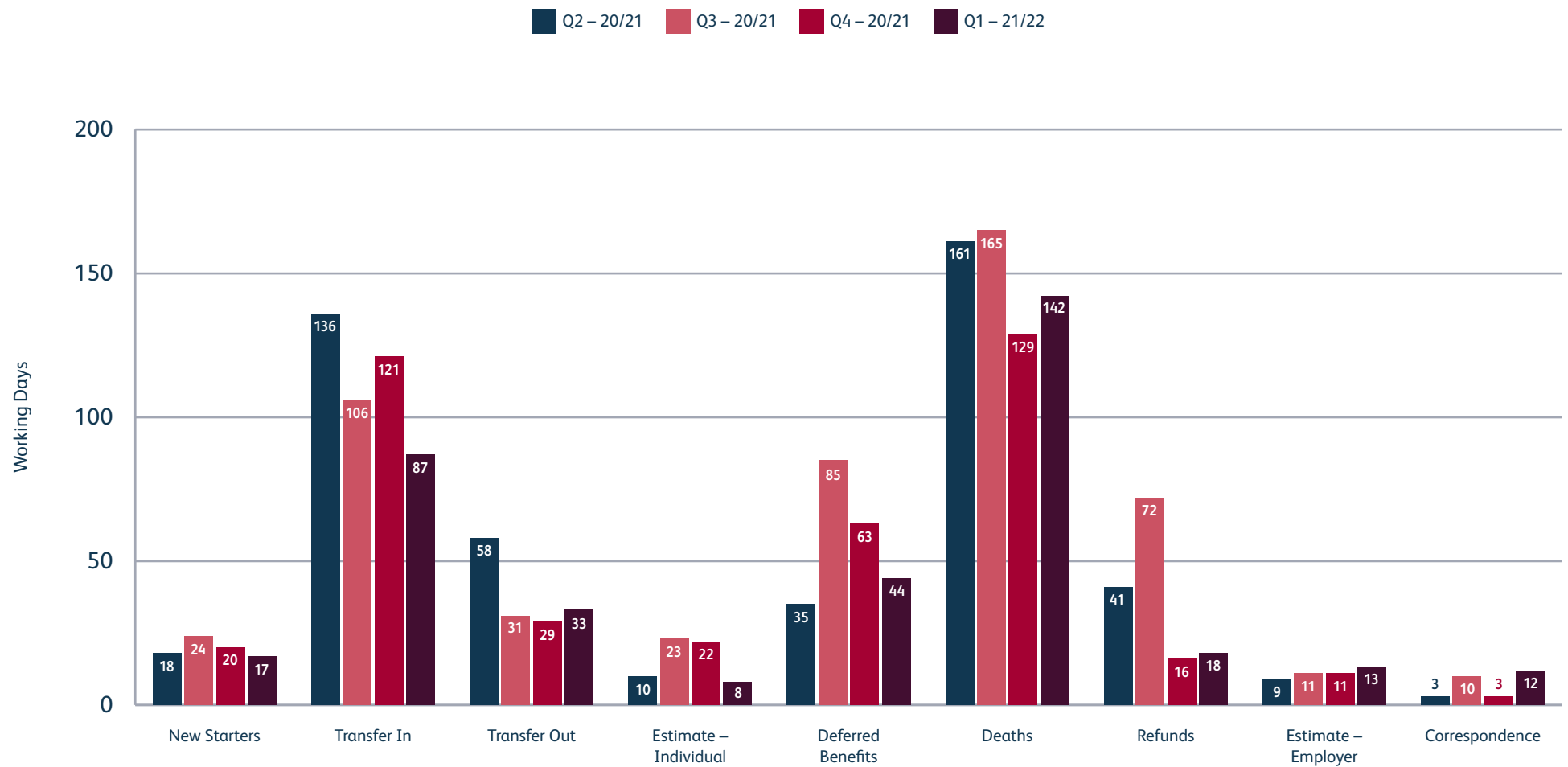


Doing The Right Thing

# Elapsed Times

# Elapsed Times

## ELAPSED DAYS BY QUARTER







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# Retirements

# Retirements

	Retirements (Deferred)*			Retirements (Immediate)*		
	Total cases	On Time	SLA	Total cases	On Time	SLA
July 20	42	42	100%	4	4	100%
August 20	38	38	100%	4	4	100%
September 20	38	38	100%	11	11	100%
October 20	92	92	100%	13	13	100%
November 20	150	150	100%	9	9	100%
December 20	59	56	94.9%	9	9	100%
January 21	52	52	100%	19	19	100%
February 21	30	23	76.7%	18	15	83.3%
March 21	27	27	100%	30	30	100%
April 21	40	36	90%	40	38	95%
May 21	17	16	94.1%	11	8	72.7%
June 21	24	23	95.8%	14	14	100%

\* In Q4 20/21, we trialed a new way of prioritising retirement cases. This resulted in the retirement process being split out into it's two component parts 1) the options stage 2) the payment stage. The number of completed cases reported in this table may therefore vary to the number of retirements processed on page 11, which are reportable against the SLA. We have since re-designed the workflow so that the two component parts of the process can be handled under the one case type.



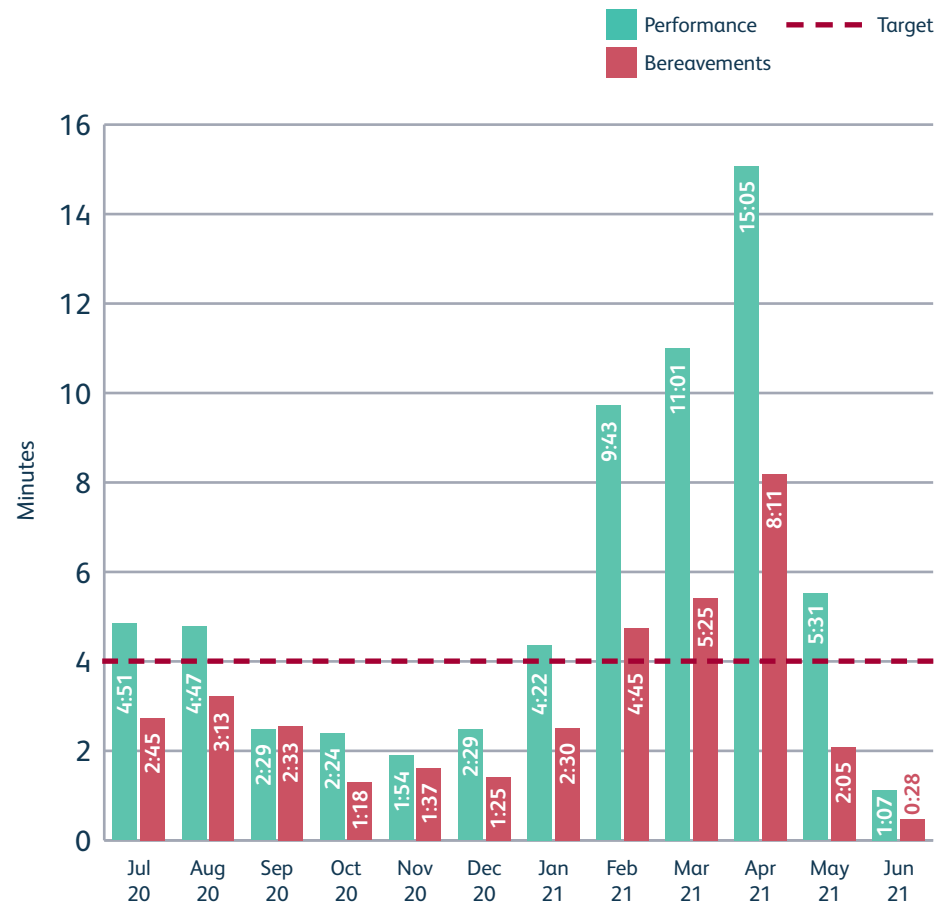
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# Helpdesk Performance

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

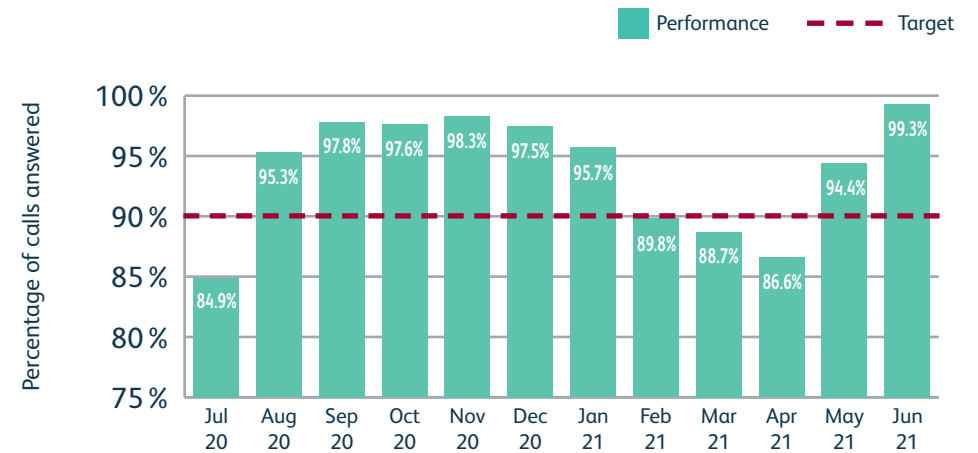
# Helpdesk Performance - Calls

## AVERAGE WAIT TIME

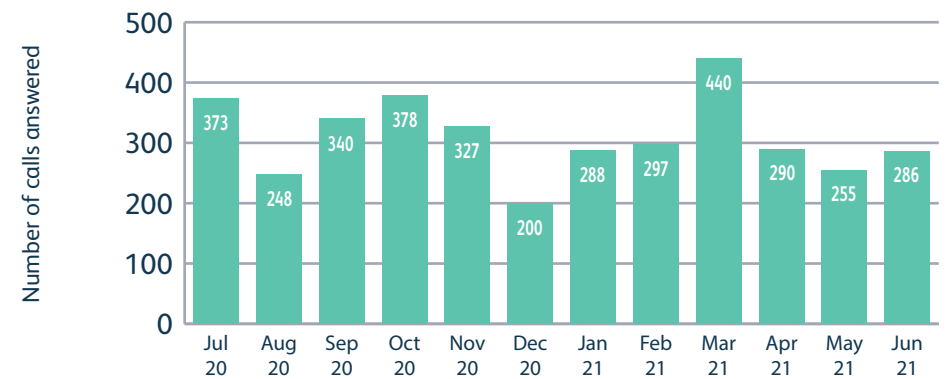


## CALLS ANSWERED

(ALL LPPA)

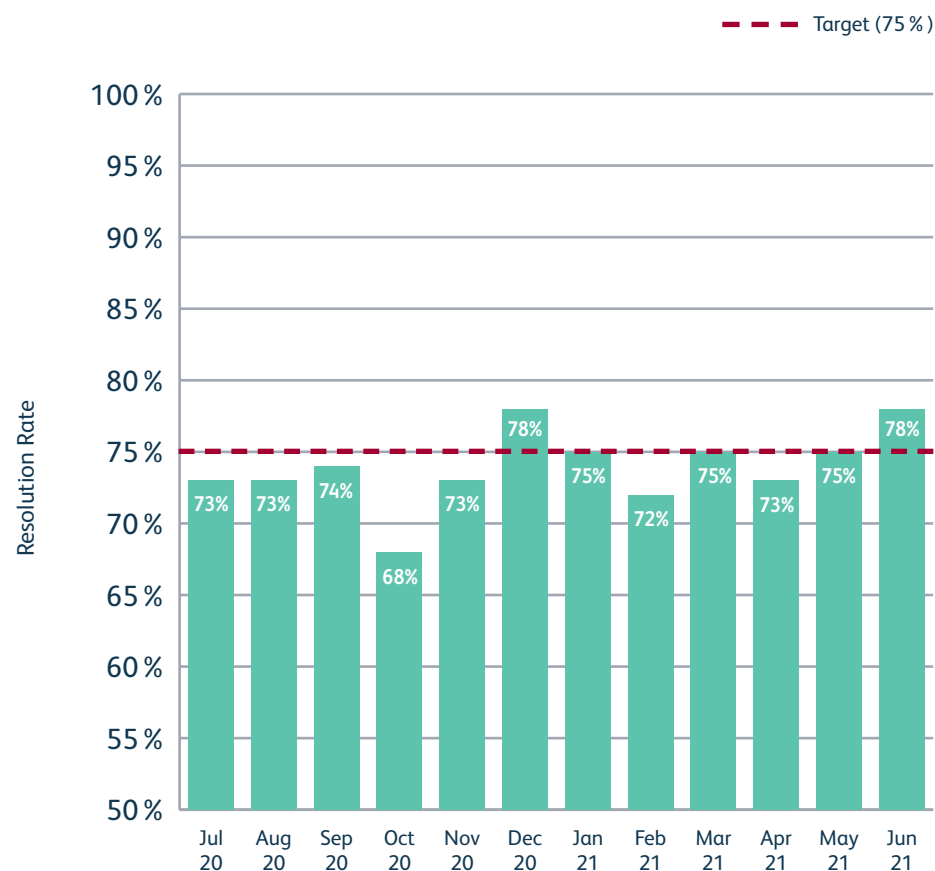


## CALL VOLUMES



# Helpdesk Performance - Calls

## RESOLUTION RATE\*



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

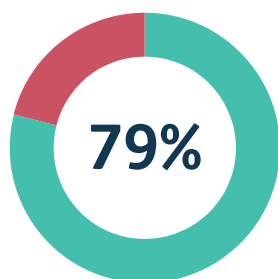
## WHAT DO MEMBERS CALL ABOUT?

	APR 21	MAY 21	JUN 21
Annual Benefit Statement	3	4	3
Annual Allowance	0	1	0
Additional Voluntary Contributions / Additional Pension Contributions	8	1	2
Bereavement	45	26	27
Deferred	7	3	11
Divorce	0	2	0
Estimate	20	13	15
Life Certificates	1	0	0
McCloud	0	0	0
My Pension Online	27	24	28
P60	1	7	2
Payslip	33	28	31
Pension Increase	0	1	0
Refund	20	7	13
Retirement	86	71	77
Transfer	21	22	24
Update Details	13	12	11
Other	5	33	42
<b>TOTALS</b>	<b>290</b>	<b>255</b>	<b>286</b>

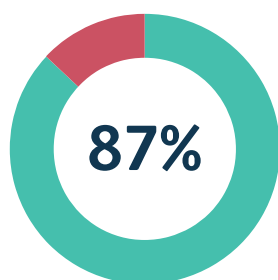
# Helpdesk Performance - Web Enquiries

## RESOLUTION RATE\* (TARGET 75%)

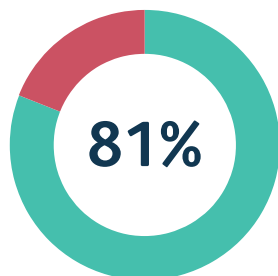
APRIL



MAY

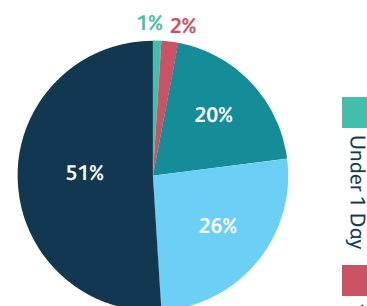


JUNE

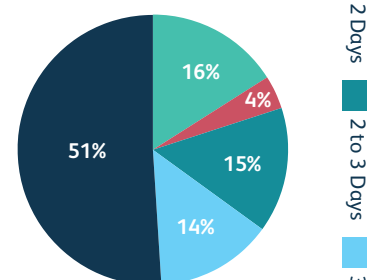


## ENQUIRY HANDLING RATE

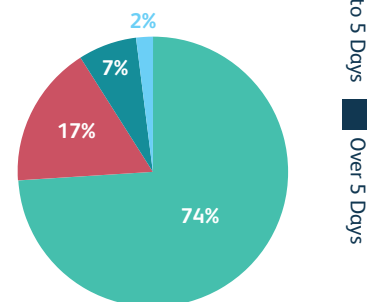
APRIL



MAY



JUNE



Under 1 Day  
1 to 2 Days  
2 to 3 Days  
3 to 5 Days  
Over 5 Days

## WHAT DO MEMBERS ENQUIRE ABOUT?

	APR 21	MAY 21	JUN 21
Annual Benefit Statement	7	3	0
Annual Allowance	0	0	0
Additional Voluntary Contributions / Additional Pension Contributions	5	3	2
Bereavement	20	7	10
Deferred	4	3	2
Divorce	1	1	0
Estimate	16	6	8
Life Certificates	0	2	0
McCloud	0	0	0
My Pension Online	20	31	27
P60	10	7	2
Payslip	14	0	9
Pension Increase	0	0	1
Refund	7	10	2
Retirement	37	23	23
Transfer	45	14	5
Update Details	25	11	18
<b>TOTALS</b>	<b>211</b>	<b>121</b>	<b>109</b>

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



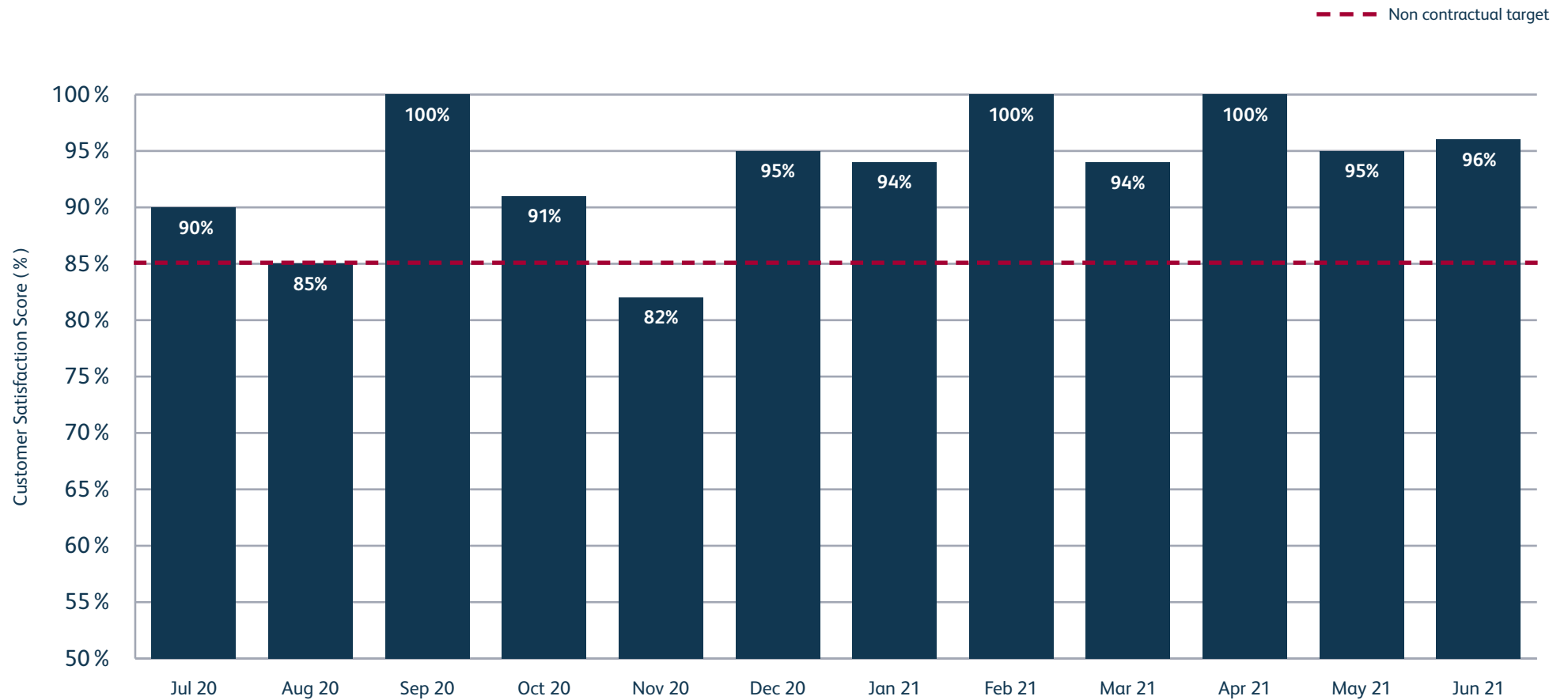


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# Customer Satisfaction Scores

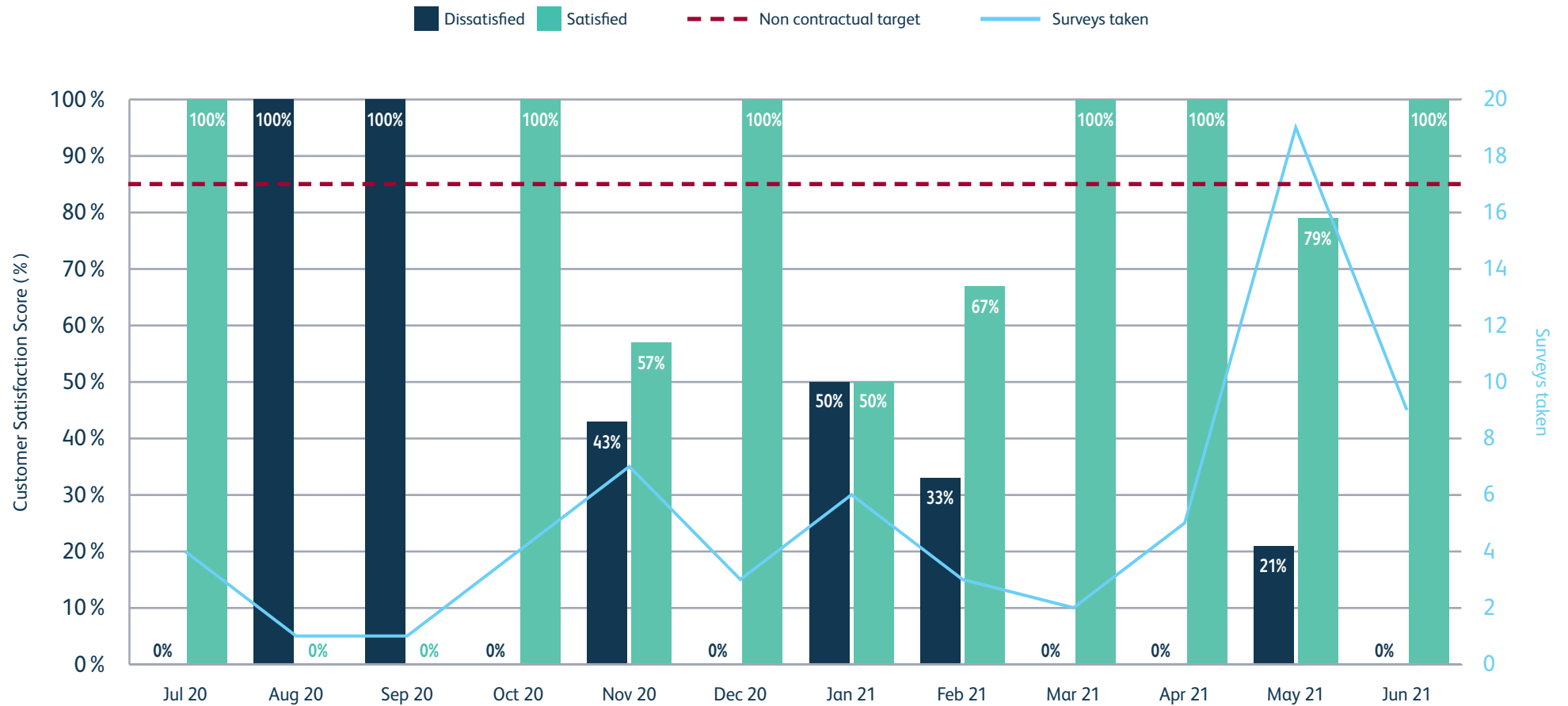
# Customer Satisfaction Scores

## HELPDESK SATISFACTION (CALLS)



# Customer Satisfaction Scores

## RETIREMENTS



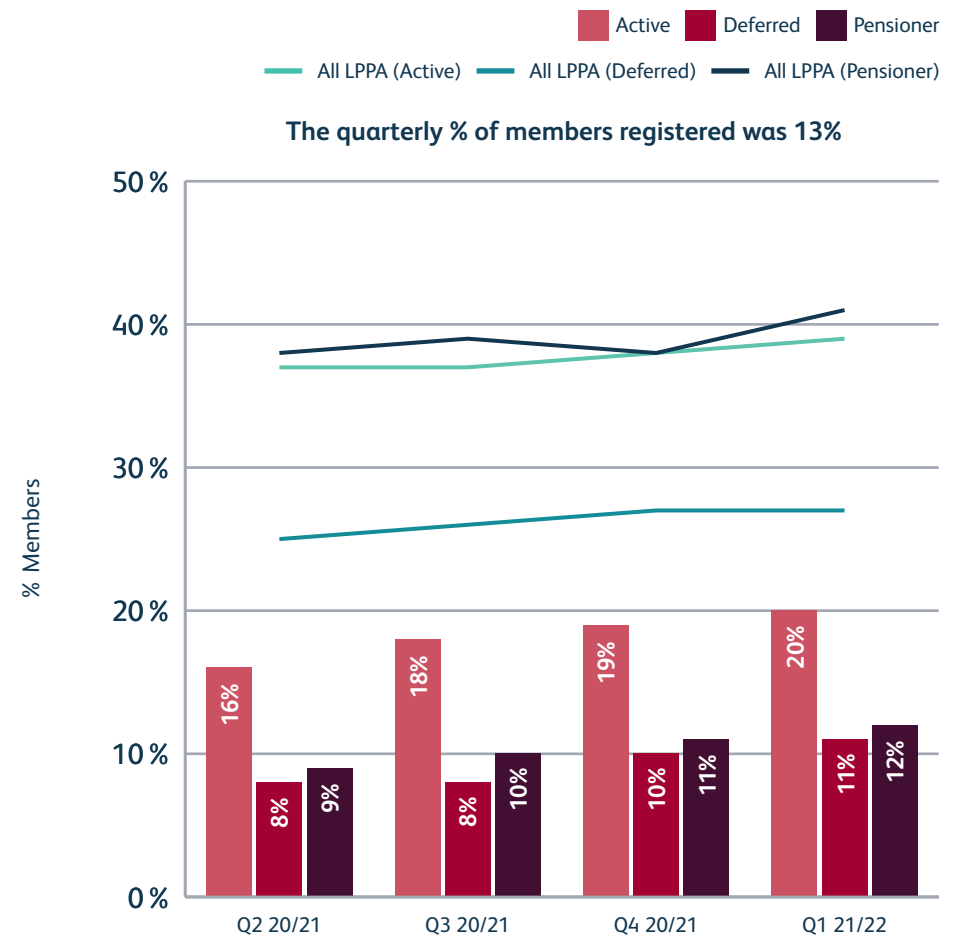


Forward Thinking

# My Pension Online (MPO)

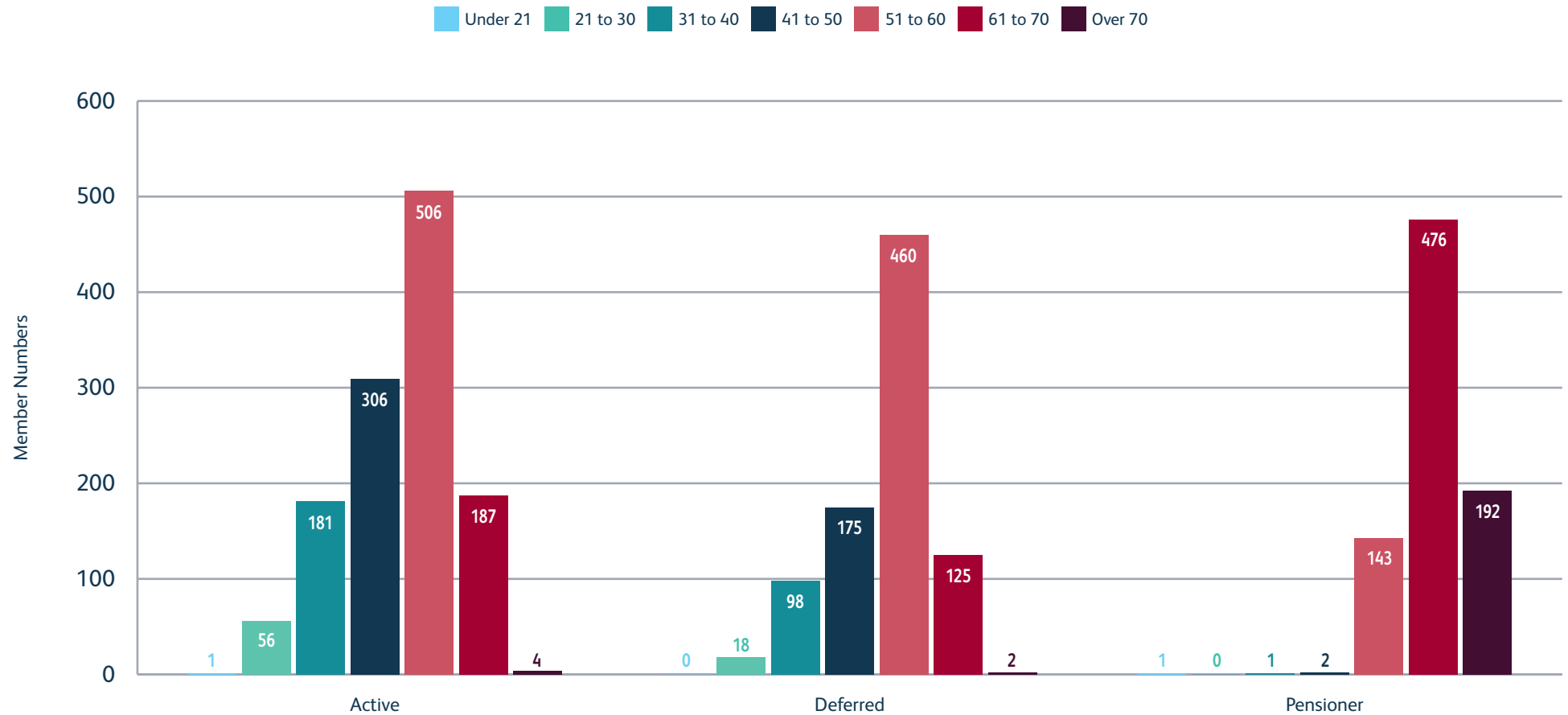
# My Pension Online

## MEMBERS REGISTERED



# My Pension Online

## AGE DEMOGRAPHIC







Forward Thinking

# Service Improvements

# Service Improvements

## DELIVERED

*Note: the following outlines improvements to our service that has benefited all Clients.*

1. Removal of email into the AskPensions mailbox and launch of an improved 'Contact LPPA' webform, including multiple enquiry (drop-down) options and document uploads. This will enable LPPA to provide quicker and more accurate responses to queries (as the form includes mandatory information fields, and enables all ongoing enquiries to be tracked)
2. ABS notification activity started in Q1, with the deadline for completion of 31st August
3. Launch of several 'Member Experience' self-service videos including:
  - [Sign up to My Pension Online](#)
  - [Reset Your My Pension Online Password](#)
  - [How to Use the Pension Payments Calculator](#)
4. My Pension Online queries have been routed from the IVR to our improved website self-service resources (highlighted in previous point)
5. Pensions documents (descriptions) in My Pension Online have been simplified to improve Members understanding of what information they include
6. Launch of an Employer Contact Form, which also enables multiple document attachment, and options to ensure queries are handled quicker, more effectively, and more securely
7. Triage of Retirement forms on receipt (included as part of improvements to process and case type)
8. LPPA signed a Pension Scams pledge to help improve how we protect Members. The pledge is set up by The Pensions Regulator and aims to encourage administrators to protect pension scheme Members from scams (and follows LPPA joining the Pension Scams Industry Forum in November last year)
9. AVC statements loaded onto Members' My Pension Online records

# Service Improvements

## SCHEDULED

1. Improvements made to Member Surveys, to deliver better engagement and an increased number of responses (review will start with the Retirement survey)
2. Review Welcome programme (new starters) to consider improved Member experience, with the introduction of a Welcome survey
3. Launch of '[LPPA – Who We Are](#)' animated video that will feature on the website, and will also be used for the enhanced Welcome programme



Forward Thinking

# Member Contact Data

# Member Contact Data

## EMAIL ADDRESSES

	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21	Q1 – 21/22
Active Contributors	2,031 (29.84%)	3,092 (47.76%)	3,128 (50.16%)	3,220 (52.25%)
Deferred Beneficiaries	1,481 (18.72%)	1,643 (20.47%)	1,811 (22.12%)	1,872 (22.80%)
Pensioner and Dependants	1,054 (14.87%)	1,152 (16.79%)	1,266 (18.51%)	1,397 (20.33%)

## TELEPHONE NUMBERS

	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21	Q1 – 21/22
Active Contributors	320 (4.70%)	388 (5.99%)	547 (8.77%)	552 (8.96%)
Deferred Beneficiaries	324 (3.46%)	382 (4.03%)	529 (5.48%)	566 (5.83%)
Pensioner and Dependants	632 (8.91%)	691 (10.07%)	903 (13.20%)	1,032 (15.02%)

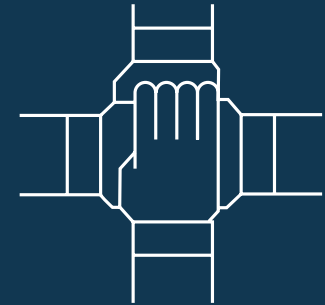
# Member Contact Data

## DEATH NOMINATION

	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21	Q1 – 21/22
Active Contributors	579 (8.51%)	639 (9.87%)	711 (11.40%)	742 (12.04%)

## E-COMMUNICATIONS OPT-OUT

	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21	Q1 – 21/22
Active Contributors	13 (0.19%)	13 (0.20%)	11 (0.18%)	11 (0.18%)
Deferred Beneficiaries	27 (0.29%)	28 (0.30%)	28 (0.29%)	28 (0.29%)
Pensioner and Dependants	369 (5.20%)	361 (5.26%)	358 (5.23%)	358 (5.21%)



Working Together

# Engagement Activity

# Engagement Activity

## ENGAGEMENT & COMMUNICATIONS OVERVIEW – ALL CLIENTS

- Updated Q4 Covid-19 impact reports issued to Clients, to provide a full year view of weekly bereavement notifications, compared to the previous year
- LPPA Helpdesk was shortlisted for two UK National Contact Centre awards, with nominations in both the Contact Centre of the Year category, as well as the Team Manager of the Year category (Rising Star)
- The LPPA Retirement campaign 'Life is for Living' was launched, which included:
  - Member research (to understand Member attitudes towards retirement)
  - Video animation to help Members understand the retirement process (and what they and their Employer needs to do to ensure everything runs smoothly)
  - Top 10 Tips for Retiring Members
- Retirement Essentials – a programme of online sessions for Members were launched, to help them navigate the retirement process (includes tips and useful support on things like how to complete the retirement form)
- Employer Retirement Notification workshops – these 1-1 Employer sessions have been launched to look at reasons for delays in Employer driven notifications (intention to retire), so that better support and communications can be implemented (ultimately so that Members can be paid their first pension payment on time)
- A pilot email campaign was issued to active Employers (of a single selected Client) to encourage contacts to confirm McCloud data submissions (from 2014, including changes to hours data and notification of service breaks) and general data confidence. This activity will be rolled out to all Employers of LG Clients in Q2
- The LPPA Practitioners Conference was delivered online to a total of c. 70 Employer contacts on the 23/24 June. Presentations included updates from Operation Team Managers, an Engagement and Communications 12 month review (and focus for the next 12 months) and also a demonstration of the new UPM administration IT platform from Civica
- The Communications team launched a set of new and improved Member Retirement letters (several variations) and forms, aimed at improving the language, and making the content more understandable for the Member
- A new 'next steps' email was created and sent to Members on notification that they are planning to retire – includes retirement video and retirement tips



# Engagement Activity

## ENGAGEMENT & COMMUNICATIONS OVERVIEW – CLIENT SPECIFIC

- Virtual visits were held with 6 Brent Employers
- 3 delegates from Brent Employers attended the two day Practitioners Conference event. Topics covered included a technical update, an introduction to the future pensions administration system and a chance to meet the operations managers
- The first retirement essentials workshop was held with key Employers in attendance across all funds with 7 representatives from Brent Employers.
- Leaver essentials training was held with 3 Brent Employers in attendance
- Scheme essentials sessions were delivered with 4 Members of Brent Pension Fund in attendance



# Engagement Activity

## EMPLOYERS

Date	Employer	Activity	Number in attendance
13 April 2021	The Village School	Virtual visit	2
22 April 2021	Brent Council	Leaver essentials training	1
22 April 2021	Capital City Academy	Leaver essentials training	1
22 April 2021	Making the Leap	Leaver essentials training	1
26 April 2021	Malorees Junior School	Virtual visit	1
04 May 2021	St Mary Magdalen's Catholic Junior School	Virtual visit	1
05 May 2021	Fawood Children's Centre	Virtual visit	2
13 May 2021	St Joseph's Infant and Junior Schools	Virtual visit	1
19 May 2021	JFS School	Virtual visit	2
23 June 2021	Phoenix Arch School (Brent)	Practitioner conference	1
23 June 2021	Capital City Academy	Practitioner Conference	1
24 June 2021	Kingsbury High School	Practitioner conference	1
24 June 2021	Oliver Goldsmith Primary school	Practitioner conference	1

## MEMBERS

Date	Employer	Activity	Number in attendance
24 May 2021	L B Brent Members	Scheme essentials	4

## EMAILS – EMPLOYERS

Date	Message / Campaign	Call to Action
APRIL	Keep Customer Contact up to date	Complete form
	Removal of askpensions mailbox	Notification
	End of Year reminder	Information
	Ill Health Webinar	Booking
MAY	End of year reminder	Information
	PACE: Introducing Project PACE	Information
	Employer Newsletter	Information
JUNE	Practitioners conference 2021	Booking
	Retirement Essentials Training	Booking
	Leaver Form Training	Booking
	Introducing Retirement Campaign	Information
	Employer contact form	Information
	PACE: Introducing Project PACE	Information
	Practitioners conference (reminder)	Information

## EMAILS – MEMBERS

Date	Message / Campaign	Call to Action
JUNE	Life is for Living (retirement campaign)	Survey
	ABS Notifications (deferred )	Information



Doing The Right Thing

# Data Quality

# Data Quality (TPR scores)

## QUARTERLY COMMON DATA

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	4	97	29
Surname	0	0	0
Forename / Initials	0	16	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	40	828	41
Postcode	42	884	56
Total fails	86	1,825	134
Individual fails	46	981	85
Total members	6,163	9,710	6,870
Accuracy rate	99.3%	89.9%	98.8%

Total accuracy rate	95.1%
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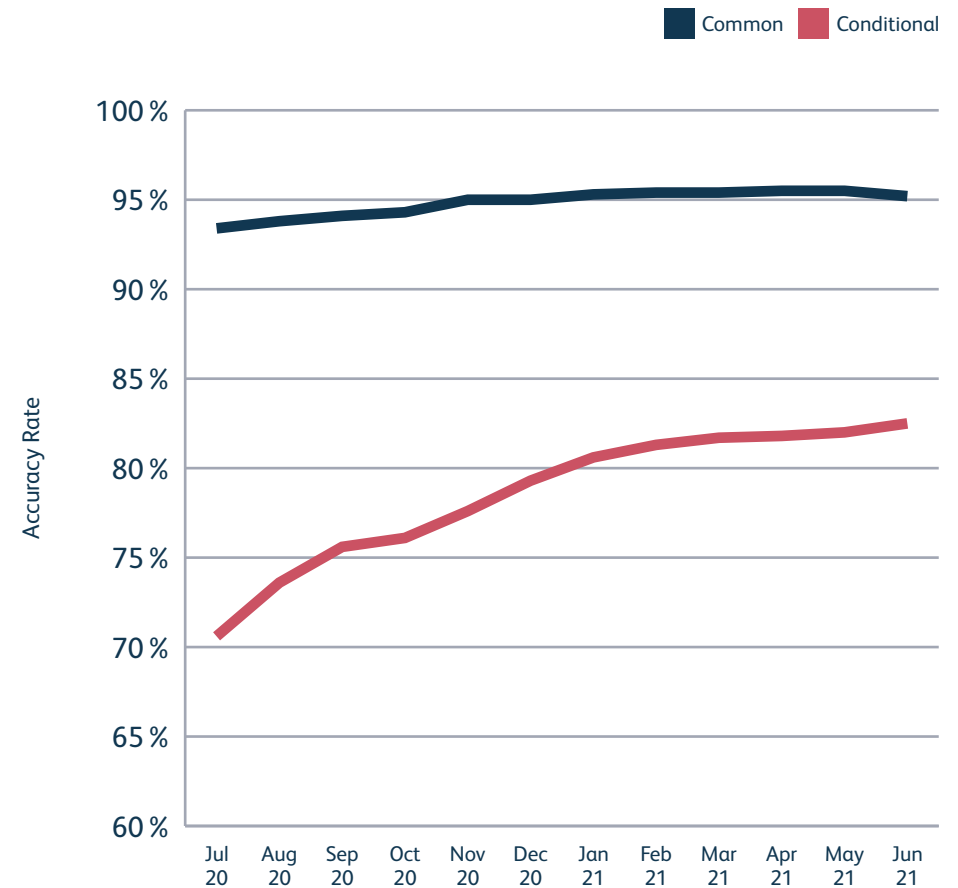
# Data Quality (TPR scores)

## QUARTERLY CONDITIONAL DATA

Data Item	Fails
Divorce records	0
Transfer In	4
AVC's / Additional Contributions	0
Deferred Benefits	0
Tranches (DB)	667
Gross Pension (Pensioners)	16
Tranches (Pensioners)	896
Gross Pension (Dependants)	21
Tranches (Dependants)	18
Date of leaving	0
Date Joined Scheme	0
Employer Details	0
Salary	668
Crystallisation	97
Annual Allowance	341
LTA Factors	0
Date Contracted Out	8
Pre-88 GMP	946
Post-88 GMP	1,418
<b>Total fails</b>	<b>5,100</b>
<b>Individual fails</b>	<b>3,986</b>
<b>Total members</b>	<b>22,743</b>

**Total accuracy rate 82.5%**

## ANNUAL COMMON & CONDITIONAL ACCURACY RATE



# LPP

Local Pensions Partnership  
Administration