

LPP

Local Pensions Partnership
Administration



Brent Pension Fund

Quarterly Administration Report

1st January – 31st March 2022

lppapensions.co.uk

Contents

Definitions	3
Our Core Values	4
Annual Plan 2021/22	5
Fund Membership	6
Casework Performance Against SLA	9
Elapsed Times	13
Retirements	15
Helpdesk Performance	17
Customer Satisfaction Scores	22
Member Online Portal	25
Member Contact Data	28
Employer Engagement & Communication Activity	31
Data Quality	36



Definitions

Page 7

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

Page 15

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 16

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 18-21

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 23 & 24

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 26

Member Online Portal

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

Page 27

Member Online Portal

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

Page 29 & 30

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 37 & 38

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.

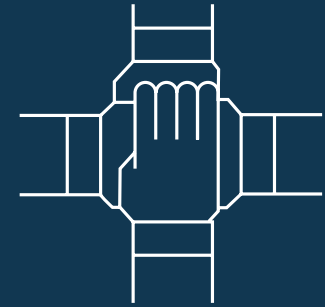
Within LPPA, our values play a fundamental role in guiding our behaviour as we grow our pensions services business and share the benefits with our Clients.



Annual Plan 2021/22

 COMPLETED
  DUE

	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22
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			✓		✓				✓			✓

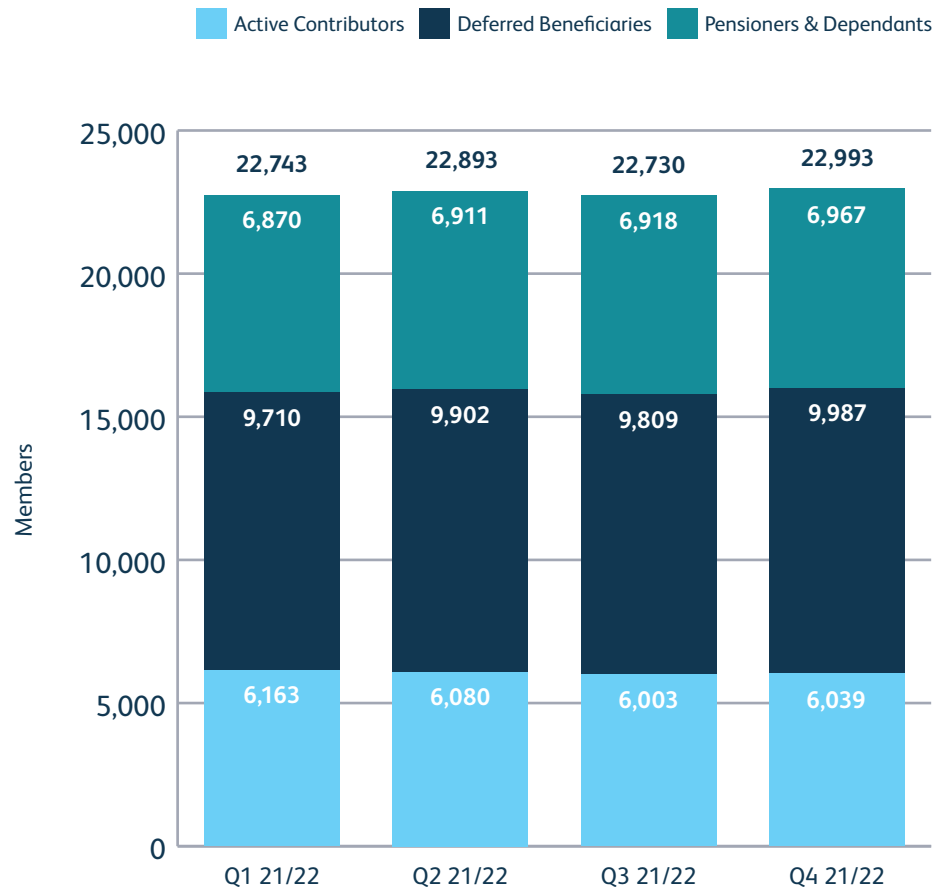


Working Together

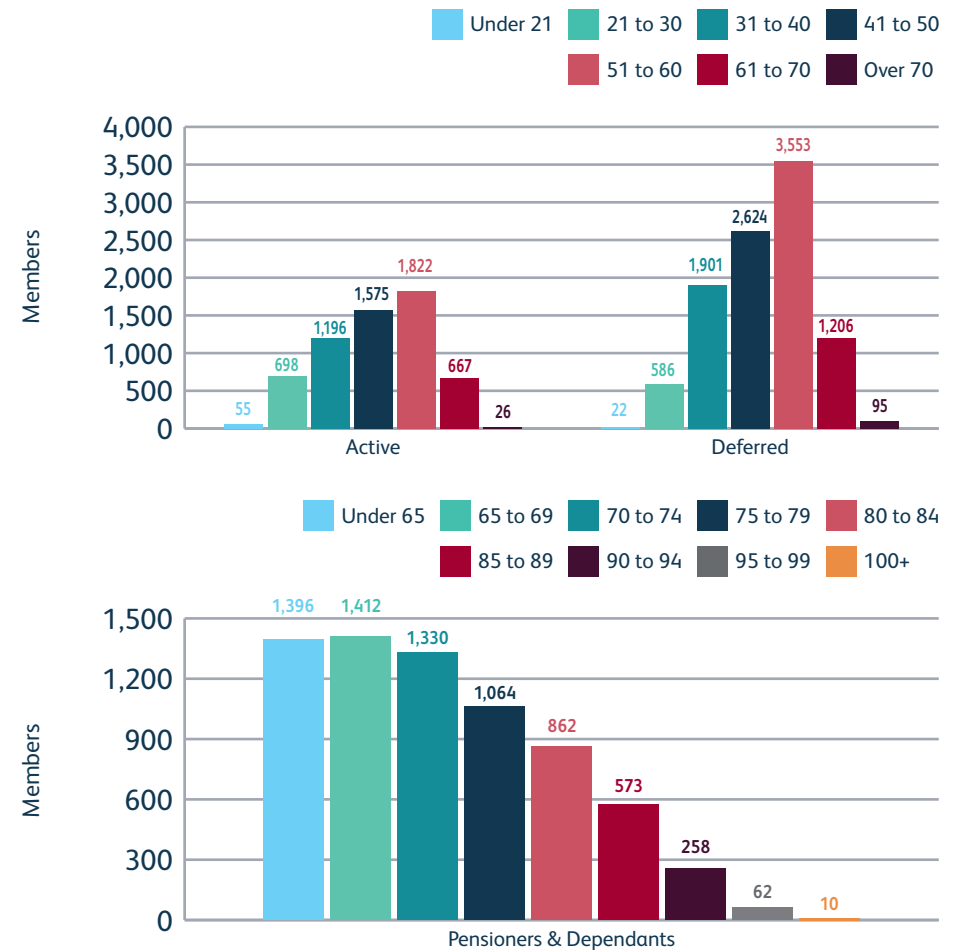
Fund Membership

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**
210	1	209

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

** *Awaiting information from Employer*

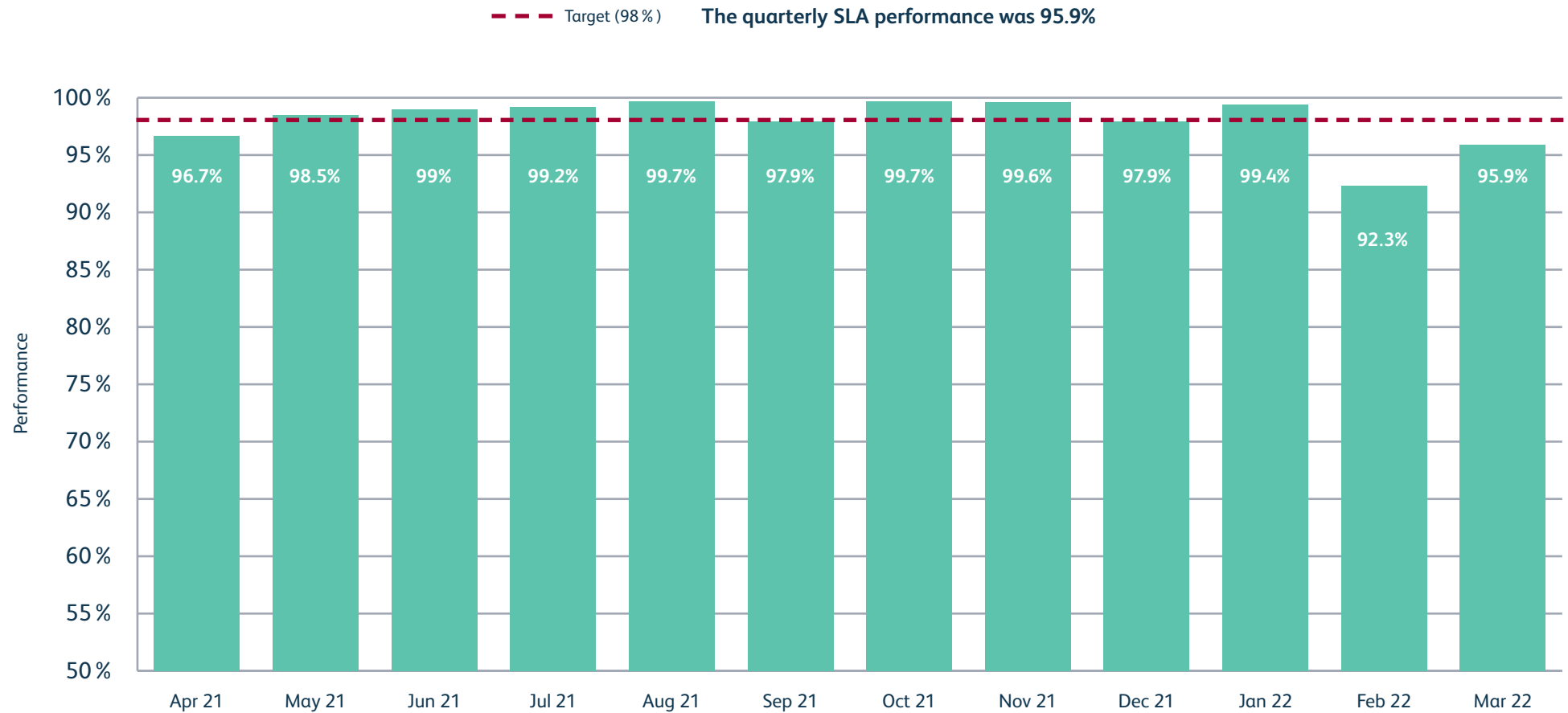


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Casework Performance Against SLA

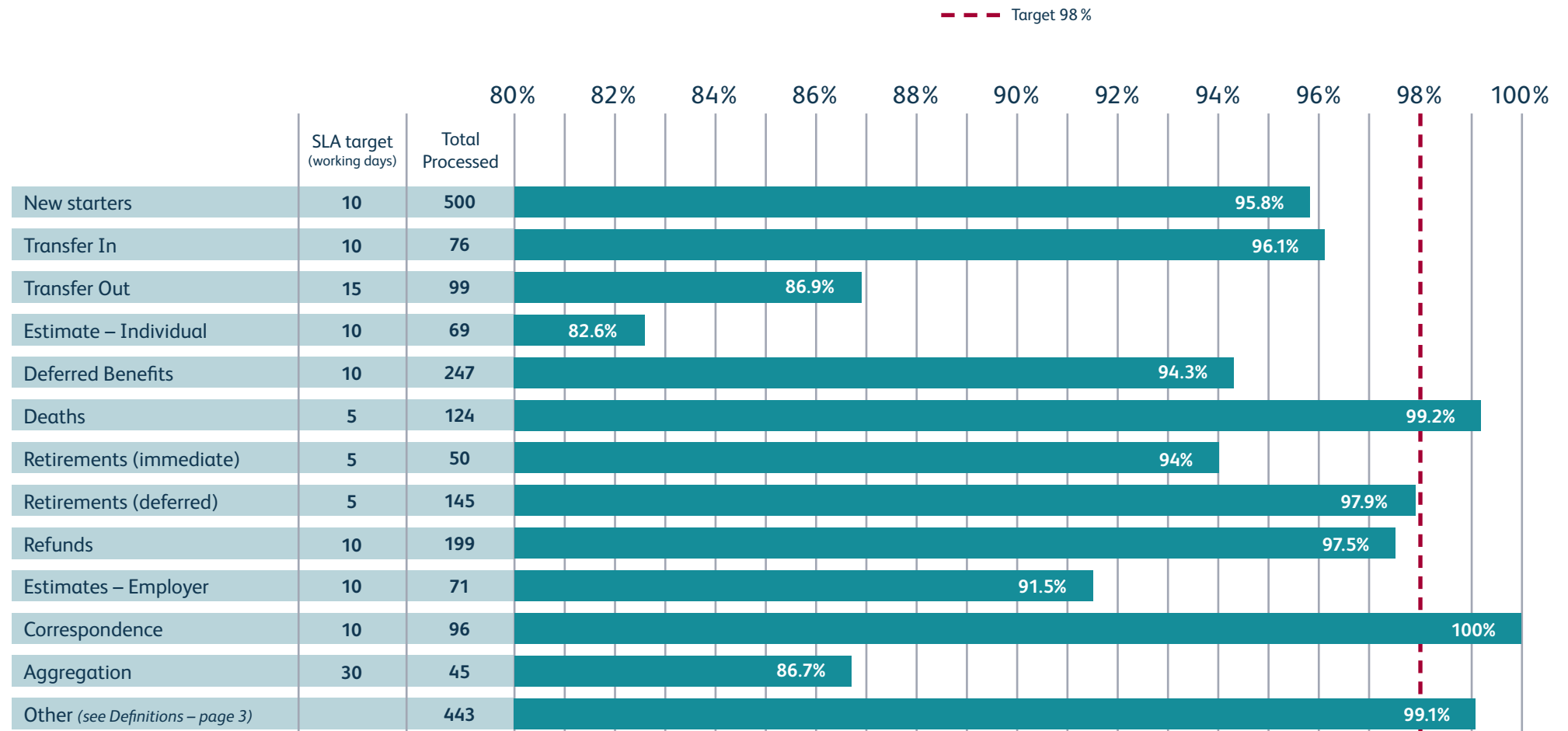
Casework Performance Against SLA

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 01/01/22	Completed	Received	Outstanding as of 31/03/22
New Starters	40	500	488	28
Transfer In	155	76	68	147
Transfer Out	119	99	116	136
Estimate - Individual	11	69	72	14
Deferred Benefits	156	247	303	212
Deaths	128	124	144	148
Retirements (Immediate)	44	50	45	39
Retirements (Deferred)	99	145	160	114
Refunds	31	199	293	125
Estimates - Employer	33	71	55	17
Correspondence	19	96	98	21
Aggregation	29	45	106	90
Other <i>(see Definitions – page 3)</i>	84	443	478	119
TOTALS	948	2,164	2,426	1,210



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
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%
July 21	27	27	100%	12	12	100%
August 21	36	36	100%	12	12	100%
September 21	31	31	100%	17	17	100%
October 21	33	33	100%	9	9	100%
November 21	48	48	100%	15	15	100%
December 21	25	25	100%	11	11	100%
January 22	45	45	100%	20	20	100%
February 22	41	38	92.7%	9	7	77.8%
March 22	59	59	100%	21	20	95.2%

* 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.



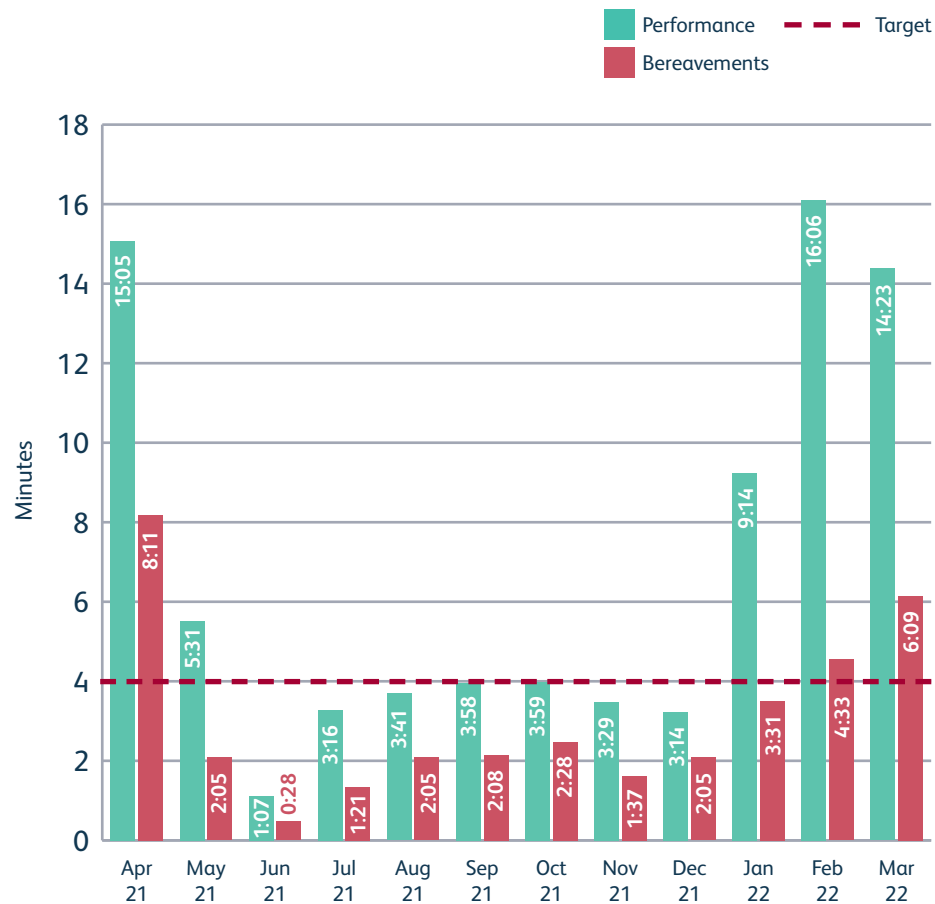
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Helpdesk Performance

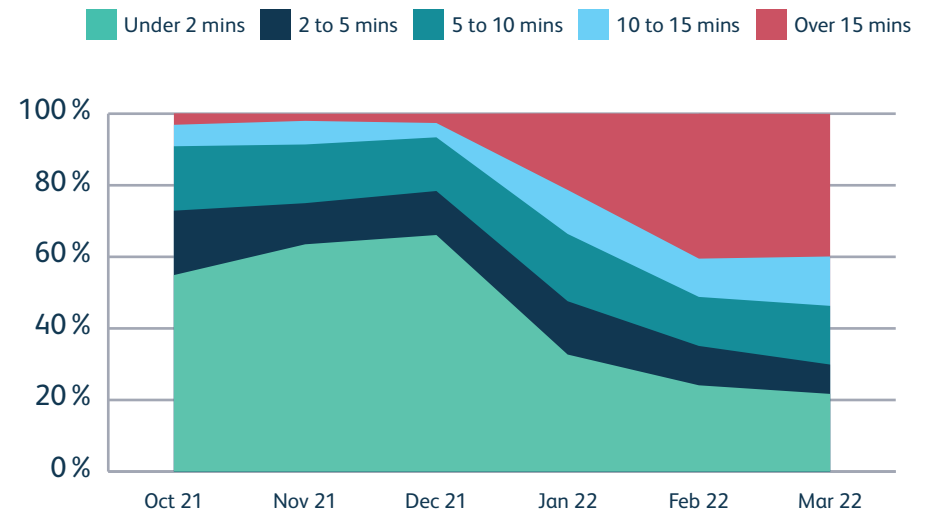
The Helpdesk deals with all online enquiries and calls from Members for all funds that LPPA provide administration services for.

Helpdesk Performance - Calls

AVERAGE WAIT TIME



WAIT TIME RANGE

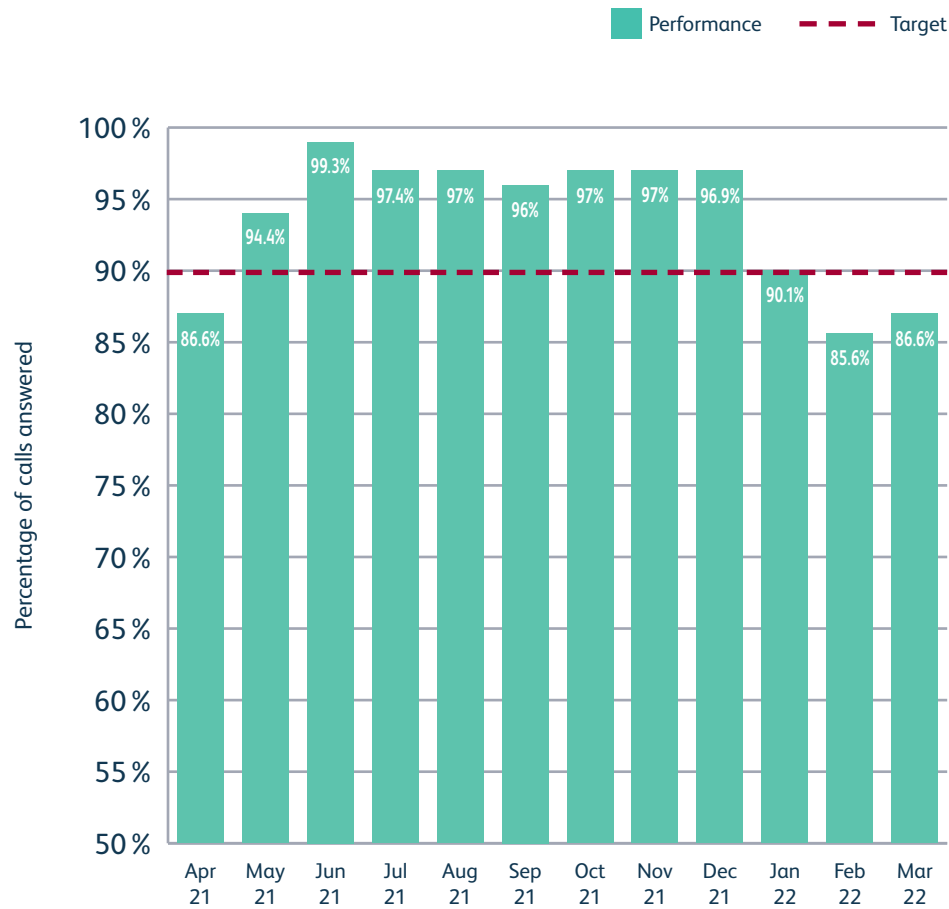


	Under 2 Mins	2 to 5 Mins	5 to 10 Mins	10 to 15 Mins	Over 15 Mins
Oct 21	54.9%	18%	18%	6%	3.2%
Nov 21	63.5%	11.5%	16.4%	6.6%	2%
Dec 21	66.1%	12.3%	15%	4%	2.6%
Jan 22	32.7%	14.9%	18.8%	12.3%	21.4%
Feb 22	24.1%	11%	13.7%	10.7%	40.5%
Mar 22	21.7%	8.2%	16.4%	13.8%	39.8%

Helpdesk Performance - Calls

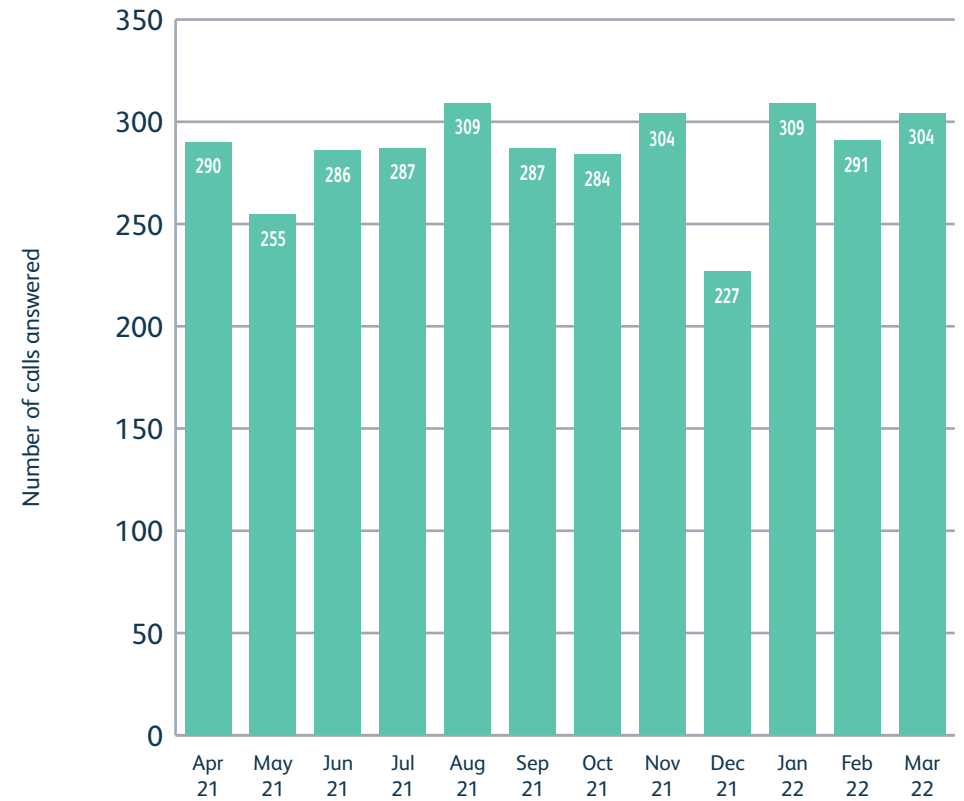
CALLS ANSWERED (%)

(ALL LPPA)



CALLS ANSWERED (VOLUMES)

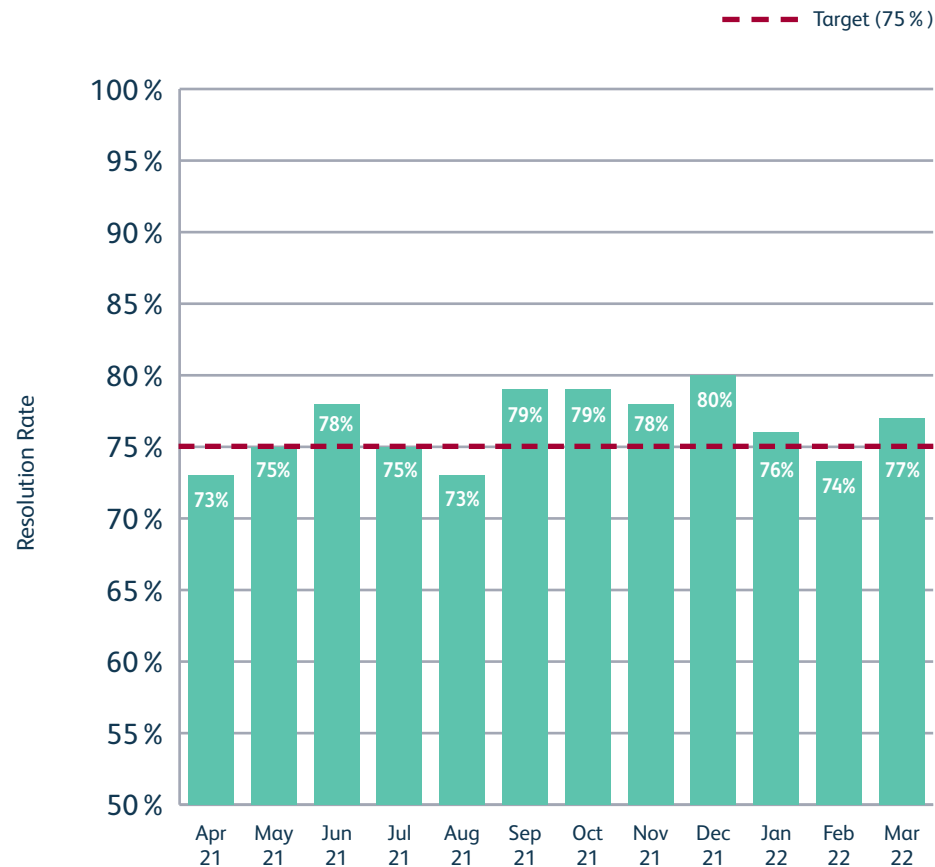
(CLIENT / FUND SPECIFIC)



Helpdesk Performance - Calls

RESOLUTION RATE*

(CLIENT / FUND SPECIFIC)



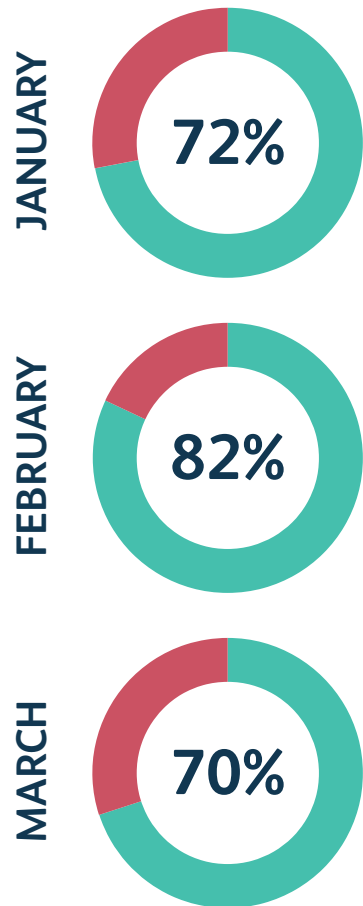
*Queries not resolved at first point of contact had a subsequent case setup. Our operations team then respond within agreed contractual timescales.

WHAT DO MEMBERS CALL ABOUT?

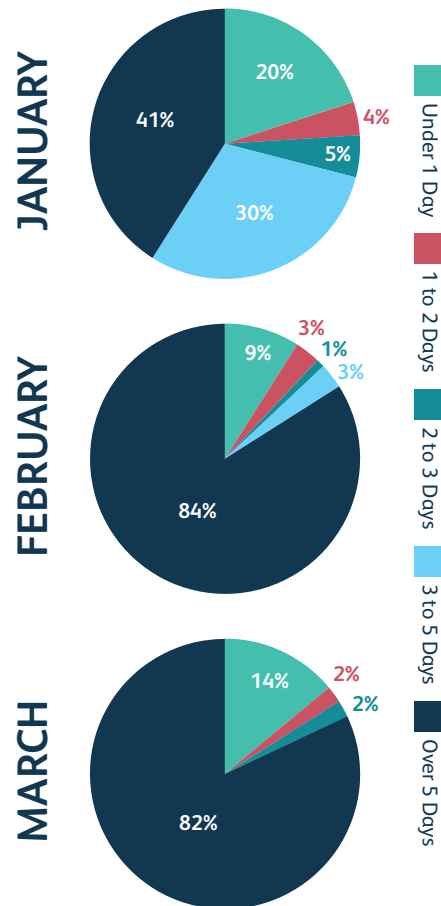
	JAN 22	FEB 22	MAR 22
Annual Benefit Statement	2	4	7
Annual Allowance	2	0	0
Additional Voluntary Contributions / Additional Pension Contributions	2	3	3
Bereavement	34	34	38
Deferred	4	5	6
Divorce	2	2	2
Estimate	17	22	12
Life Certificates	3	0	1
McCloud	0	0	0
Member Online Portal	32	24	35
P60	6	1	2
Payslip	45	27	28
Pension Increase	0	1	1
Refund	14	27	15
Retirement	83	84	98
Transfer	20	20	29
Update Details	19	9	12
Other	24	28	15
TOTALS	309	291	304

Helpdesk Performance - Web Enquiries

RESOLUTION RATE* (TARGET 75%)



ENQUIRY HANDLING RATE



WHAT DO MEMBERS ENQUIRE ABOUT?

	JAN 22	FEB 22	MAR 22
Annual Benefit Statement	3	0	3
Annual Allowance	1	1	0
Additional Voluntary Contributions / Additional Pension Contributions	4	1	4
Bereavement	6	2	5
Deferred	3	0	2
Divorce	0	0	1
Estimate	6	9	6
Life Certificates	0	0	3
McCloud	0	0	0
Member Online Portal	23	20	8
P60	0	1	2
Payslip	7	11	0
Pension Increase	0	0	0
Refund	5	0	3
Retirement	33	28	18
Transfer	6	2	16
Update Details	14	6	14
Other	-	-	19
TOTALS	111	81	104

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

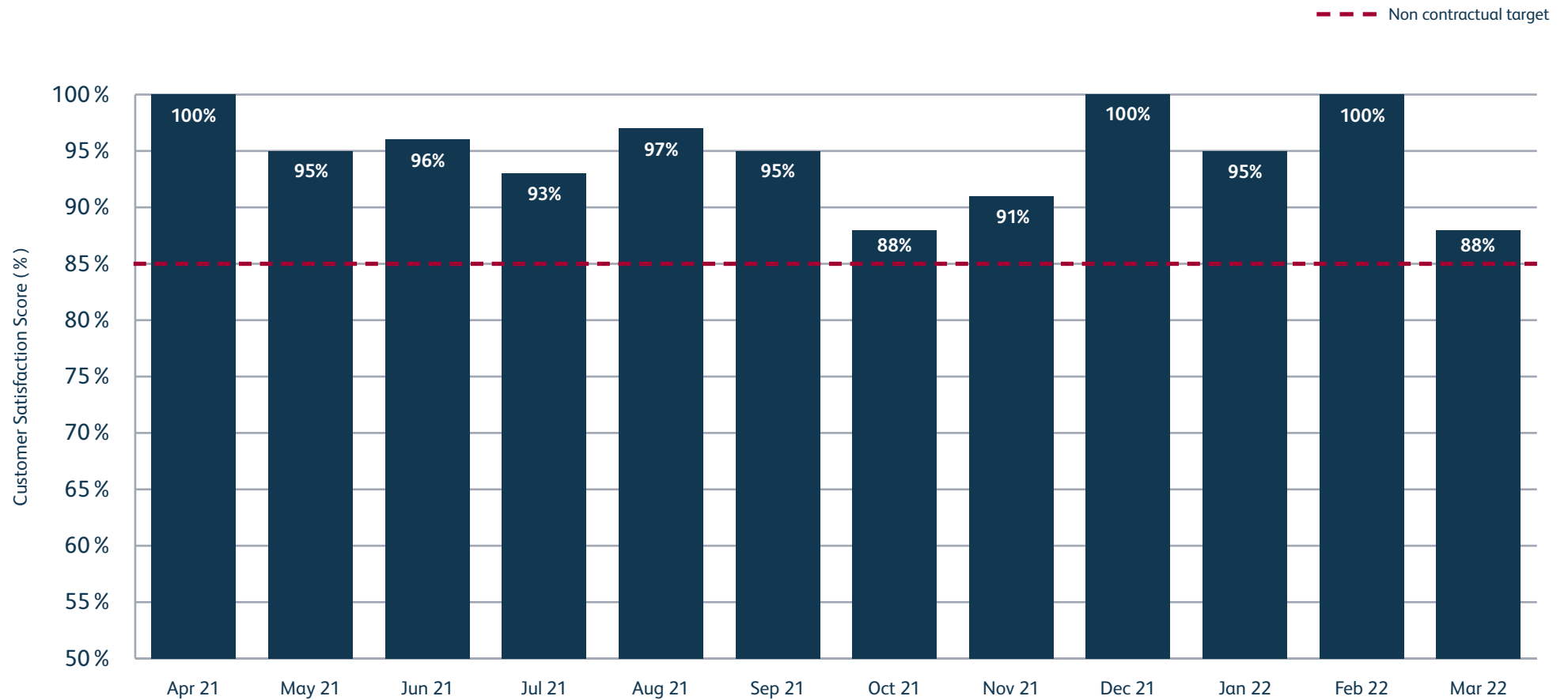


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Customer Satisfaction Scores

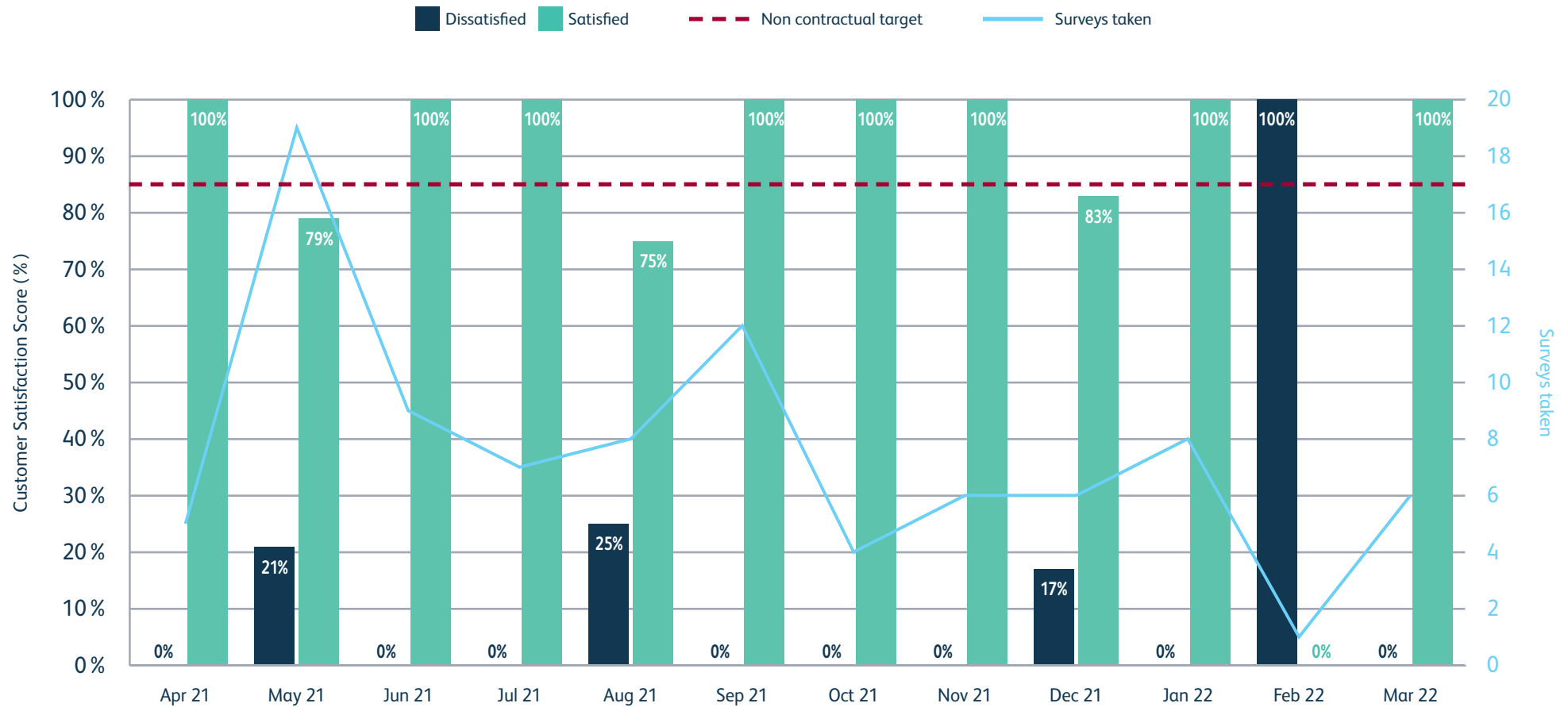
Customer Satisfaction Scores

HELPDESK SATISFACTION (CALLS)



Customer Satisfaction Scores

RETIREMENTS



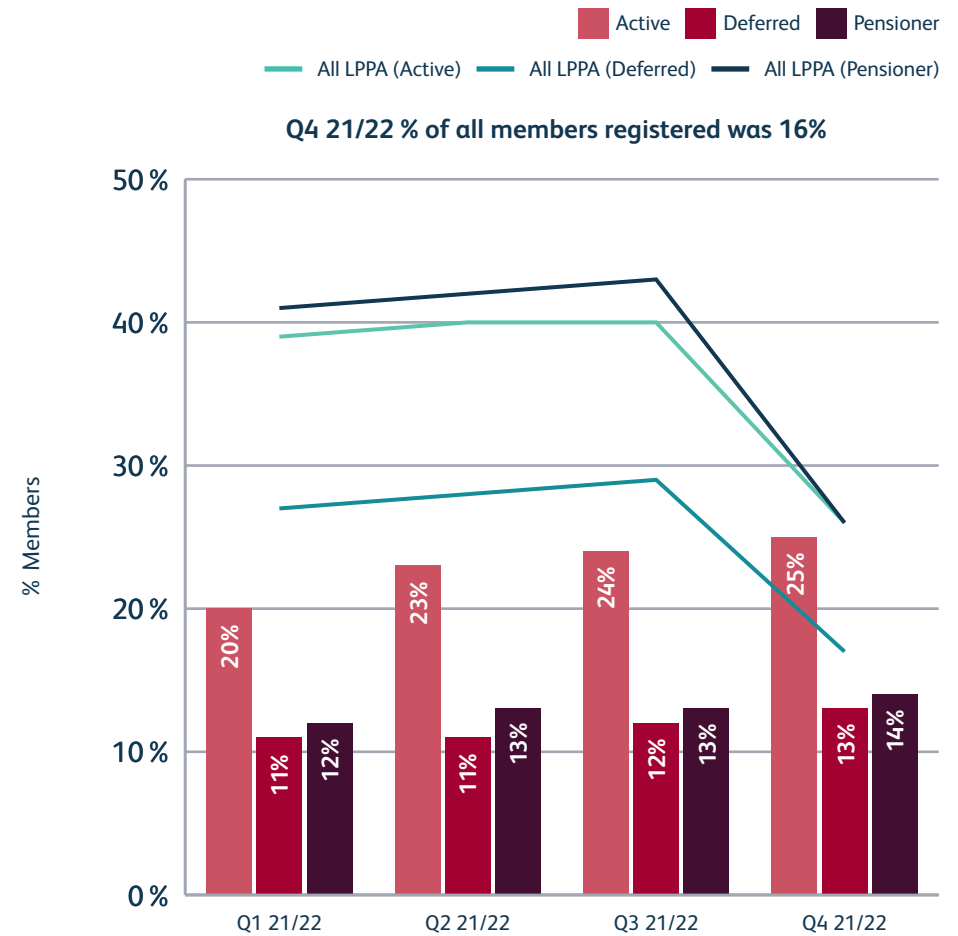
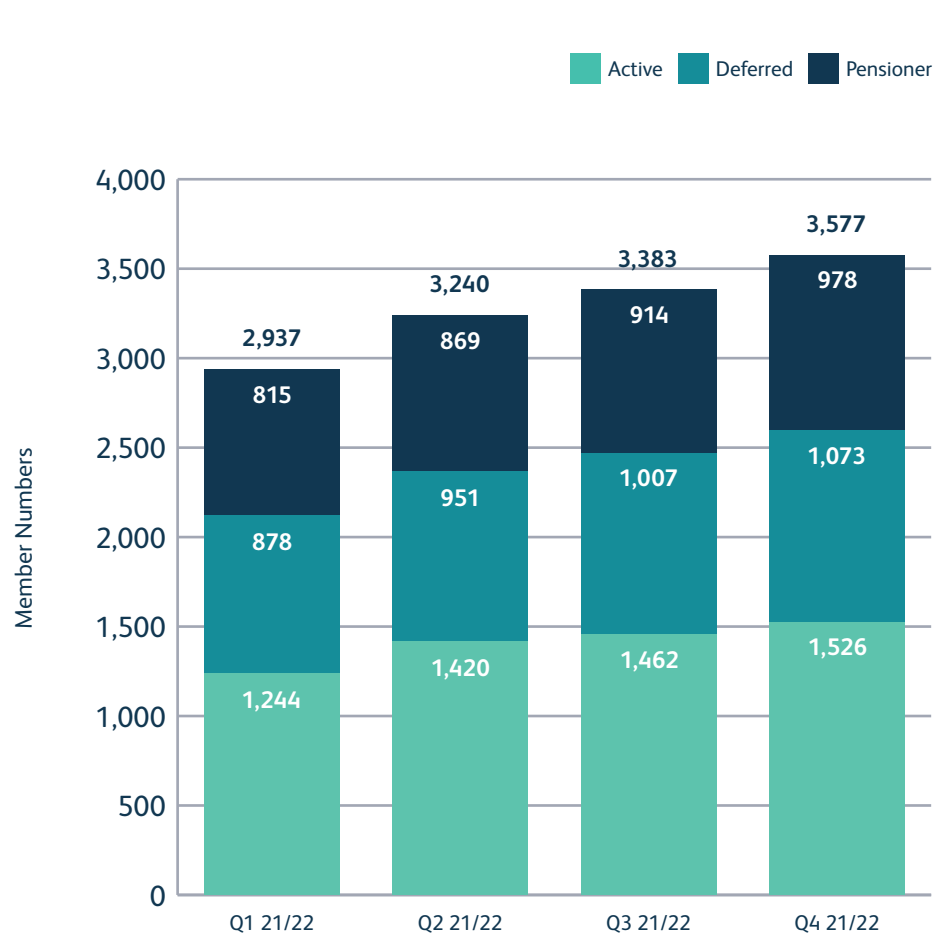


Forward Thinking

Member Online Portal

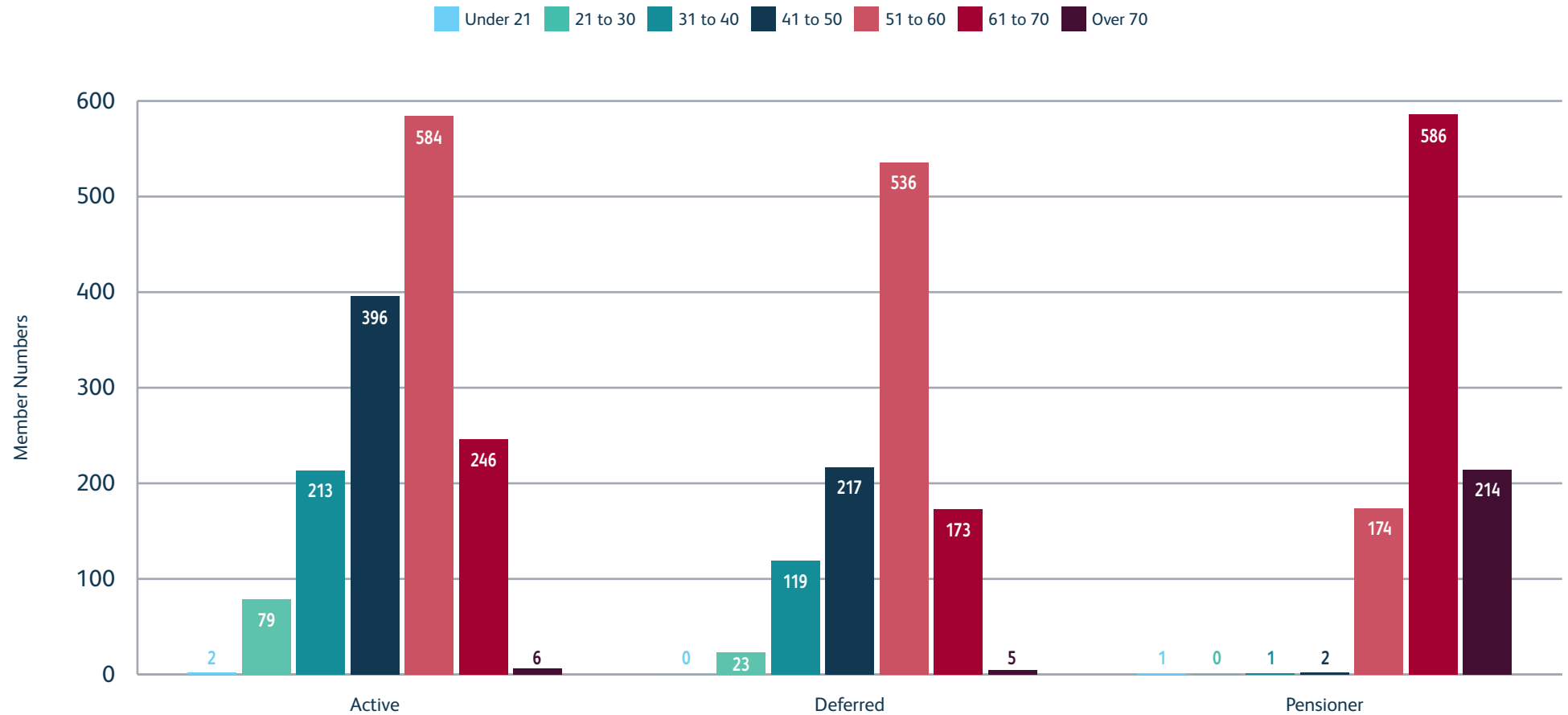
Member Online Portal

MEMBERS REGISTERED



Member Online Portal

AGE DEMOGRAPHIC





Forward Thinking

Member Contact Data

Member Contact Data

EMAIL ADDRESSES

	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22	Q4 - 21/22
Active Contributors	3,220 (52.25%)	3,434 (56.48%)	3,477 (57.92%)	3,679 (60.92%)
Deferred Beneficiaries	1,872 (22.80%)	1,986 (23.91%)	2,092 (24.93%)	2,187 (25.83%)
Pensioner and Dependents	1,397 (20.33%)	1,498 (21.68%)	1,565 (22.62%)	1,689 (24.24%)

TELEPHONE NUMBERS

	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22	Q4 - 21/22
Active Contributors	552 (8.96%)	617 (10.15%)	671 (11.18%)	702 (11.62%)
Deferred Beneficiaries	566 (5.83%)	643 (6.49%)	730 (7.44%)	794 (7.95%)
Pensioner and Dependents	1,032 (15.02%)	1,143 (16.54%)	1,239 (17.91%)	1,359 (19.51%)

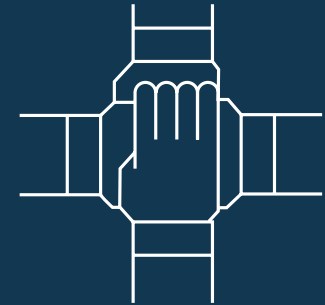
Member Contact Data

DEATH NOMINATION

	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22	Q4 - 21/22
Active Contributors	742 (12.04%)	918 (15.10%)	946 (15.76%)	976 (16.16%)

E-COMMUNICATIONS OPT-OUT

	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22	Q4 - 21/22
Active Contributors	11 (0.18%)	12 (0.20%)	11 (0.18%)	11 (0.18%)
Deferred Beneficiaries	28 (0.29%)	28 (0.28%)	28 (0.29%)	27 (0.27%)
Pensioner and Dependents	358 (5.21%)	357 (5.17%)	354 (5.12%)	351 (5.04%)



Working Together

Employer Engagement & Communication Activity

Employer Engagement & Communication Activity

DELIVERED – ALL CLIENTS

1. A significant focus for the Engagement and Communications team in the period Jan to March 22, has been to support the successful rollout of Project PACE (Phase 1) to 5 LGPS clients and 4 Fire and Rescue Services clients. This has involved a considerable number of training sessions with employers, covering topics including all pension processes that are submitted through the new UPM employer portal.
2. We have also undertaken onboarding of a new LGPS client (London Borough of Hammersmith and Fulham) in January, which included communication and engagement activity to their employers and members.
3. As part of the UPM administration system implementation, a new member online portal (PensionPoint) was launched to members of Phase 1 funds. This will ultimately replace the current My Pension Online portal, once all clients have moved to the UPM platform.
4. The team has continued to deliver 'business as usual' support sessions with employers, and online workshops to members including Scheme Essentials and Retirement Essential sessions.
5. Member communications and employer training and support plans have been developed for 2022/23 (all employer training is now bookable via the LPPA website).
6. Regular updates continue to be added to the [news page](#) of the LPPA website (weekly articles on a variety of topics - this page is used to keep both members and employers informed and up to date with current events).
7. LPPA has launched its own LinkedIn account (previously shared with LPPI) and seen a steady increase in posts and followers in 2022.
8. LPPA's YouTube channel has been instrumental in the launch of PensionPoint (with around 3,000 views of the new registration videos in just 2 months).

Employer Engagement & Communication Activity

SCHEDULED – ALL CLIENTS

1. P60's will be uploaded to members online accounts before the end of May, and email notifications will be issued across the period April to May (paper copies will be mailed to members who have requested them).
2. The LPPA online Spring Newsletter for retired members will be issued around the same time as P60's.
3. ABS notification activity will be planned in Q1, with communications scheduled for delivery in line with statutory deadlines (by the end August).
4. Planning will take place, in advance of the LPPA Practitioners conference scheduled for later in June.
5. A major focus for the team will be on planning for the delivery of Phase 2 of project PACE in the second half of 2022.
6. Further video guides will be created and added to the LPPA [YouTube](#) channel, including '[How to use the PensionPoint retirement calculators](#)' (videos have been instrumental in the launch of PensionPoint, the new online member portal, with around 3,000 views of the new registration videos in the previous 2 months).

Employer Engagement & Communication Activity

ENGAGEMENT COMMUNICATIONS – CLIENT SPECIFIC

- Due to PACE training and implementation, online employer visits in Q4 were by request. In Q1 visits will focus on employers based on current performance (against key administration metrics) and employer size. We will continue to use recorded training material, accessible on our website, to support all Fund employers



Employer Engagement & Communication Activity

EMAILS – EMPLOYERS

Date	Message / Campaign	Call to Action
JANUARY	PensionPulse	Information
FEBRUARY	Reminder to submit your end of year data	Notification
MARCH	PensionPulse	Information
	Important: submit your data returns data	Notification

EMAILS – MEMBERS

Date	Message / Campaign	Call to Action
MARCH	Member panel update	Survey



Doing The Right Thing

Data Quality

Data Quality (TPR scores)

QUARTERLY COMMON DATA

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	4	73	28
Surname	0	0	0
Forename / Initials	0	6	6
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	20	527	35
Postcode	21	573	49
Total fails	45	1,179	118
Individual fails	25	646	77
Total members	6,039	9,987	6,967
Accuracy rate	99.6%	93.5%	98.9%

Total accuracy rate

96.7%

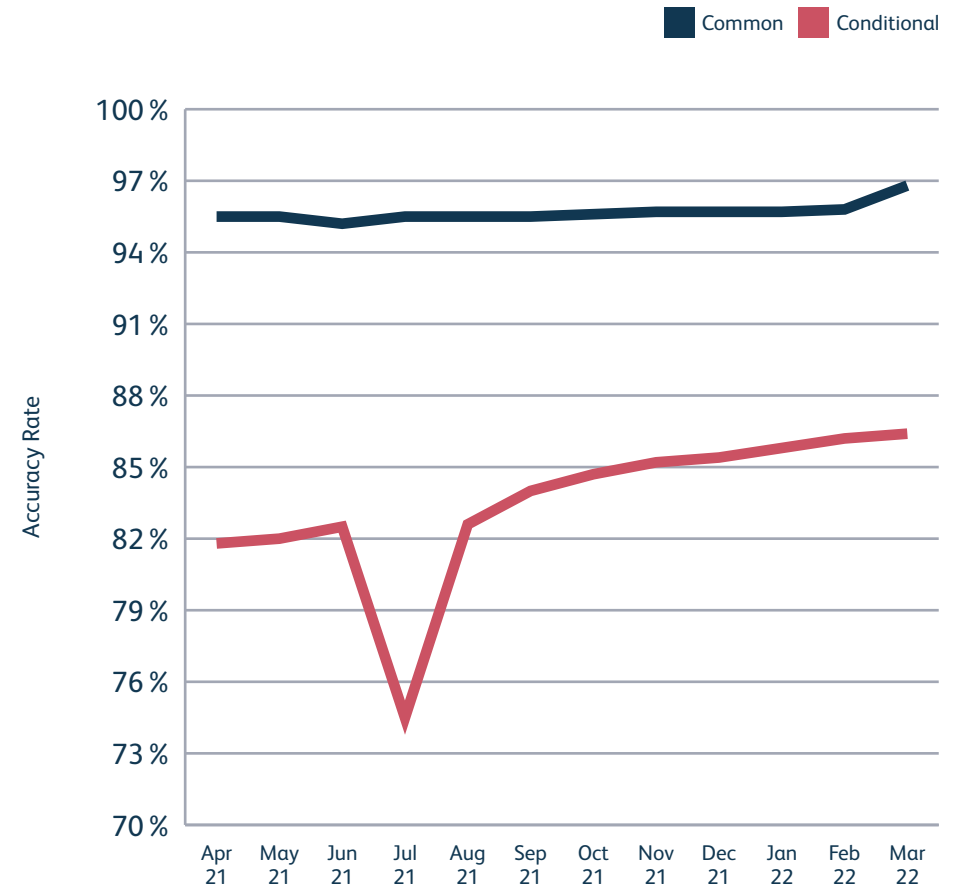
Data Quality (TPR scores)

QUARTERLY CONDITIONAL DATA

Data Item	Fails
Divorce records	0
Transfer In	4
AVC's / Additional Contributions	0
Deferred Benefits	0
Tranches (DB)	643
Gross Pension (Pensioners)	17
Tranches (Pensioners)	858
Gross Pension (Dependants)	20
Tranches (Dependants)	18
Date of leaving	16
Date Joined Scheme	0
Employer Details	0
Salary	379
Crystallisation	99
Annual Allowance	211
LTA Factors	0
Date Contracted Out	17
Pre-88 GMP	547
Post-88 GMP	959
Total fails	3,788
Individual fails	3,119
Total members	22,993

Total accuracy rate 86.4%

ANNUAL COMMON & CONDITIONAL ACCURACY RATE



LPP

Local Pensions Partnership
Administration