LPP

Local Pensions Partnership
Administration

Brent Pension Fund

Quarterly Administration Report

1st April – 30th June 2022

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. 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.

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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 'Member Online Portal' 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 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.
The percentage of calls answered does not include calls that are abandoned by the caller where the wait time is less than 2 minutes.
All figures reported in this section are non-client specific, as not all member calls are dispositioned at client level. This means that call volumes and wait times are not at client level - however, as calls are answered (through our various IVR options) in relation to wait time, performance across all LPPA clients is broadly the same

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 17 – 19
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, Neutral or Satisfied. New joiners survey is emailed to new members after they have received their scheme welcome letter.

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The number and % of Members that are registered for the Member Online Portal, including a quarterly view and a comparison with the overall LPPA sign up rate (all Members).

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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.

OUR
VALUES

WORKING TOGETHER

DOING THE RIGHT THING

FORWARD THINKING

COMMITTED TO EXCELLENCE

ANNUAL PLAN 2022/23

✔ COMPLETED   📅 DUE

	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
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

Big changes…
Forward thinking…
Doing the right thing…
Committed to excellence…

This performance report covers the reporting period of Q1 2022/23 (April – June 2022)

Given the significant change programme currently underway at LPPA, an Executive Summary is included to accompany the data and metrics outlined in this report.

The migration project to move to our new pensions administration system is well underway, with phase 1 clients (9 clients / c300,000 members) successfully migrated between January – March 2022. The remaining clients (9 clients / c300,000 members) will migrate across between October – December 2022.

To help us manage this significant change programme, we agreed a period of temporary relaxed SLA's for all clients between March – May 2022 and then again between November– January 2022. The usual overall SLA target is 95%, and this target was relaxed as follows:

- High priority relaxed SLA for 3-months post go live (relaxed to 90% target SLA).
- Other cases relaxed SLA for 3-months post go live (relaxed to 70% target SLA – with the exception of no breach in statutory deadlines, disclosure or a guarantee period).
- Ill-health estimates/retirements prioritised.
- Helpdesk call and web form wait times are likely to increase and we will manage this by proactively updating messages on our website, in the IVR when we receive calls and when a web-form is submitted to us.

PRIORITY	CASE TYPE
HIGH	Deaths • Retirements deferred • Retirements immediate
OTHER	Admissions • Refunds • Transfers Out • Transfers In Divorce • Aggregation • Deferred Benefits • Estimates – member Estimates – employer • Correspondence

Payroll

- No disruption to pensioner payroll or lump sum payments (this equates to over £100m, across all clients, in pension payments per month).
- Pensions Increase was successfully run and P60's produced in April/May.

Statutory Deadlines

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

Casework SLA Performance

During the period April to June, performance against SLA has been adversely impacted by the short-term and expected issues arising from the phased "go lives" of the migration to our new pensions administration system (UPM). The timescales of phase 1 were aggressive as we had contractual obligations to meet.

Performance against SLA is measured fundamentally differently in UPM than CMS (LPPA's former workflow system), the key differentiators being:

- The SLA "clock" starts at the beginning of a process in UPM, but on receipt of all information in CMS. Whilst CMS is in line with contractual agreements, there was not a robust way to configure UPM to replicate this; and
- The SLA "clock" restarts when a case comes off hold/pending in CMS. This does not happen in UPM, pending time is subtracted from the overall elapsed time.

The processes in UPM have been configured so that a review/triage of a process takes place within 48hrs of receipt. We expect this to result in reduced end to end elapsed times.

Overall performance against SLAs is improving month on month but are still currently below our usual overall SLA target of 95%.

EXECUTIVE SUMMARY CONTINUED

Big changes…
Forward thinking…
Doing the right thing…
Committed to excellence…

The key areas which have initially impacted SLA performance include:

1. New way of measuring performance against SLAs in UPM.
2. Increased volumes and/or spikes of work post go-live (e.g., clearing emails built up in each blackout period prior to "go live").
3. A higher number of hypercare issues post go-live than anticipated. This resulted in processes having to pause until the issue was fixed, resulting in some cases missing SLA.
4. An initial productivity dip, although LPPA are starting to see output improve across a subset of processes.
5. Managing resources across both systems, particularly in light of a competitive recruitment market.
6. System downtime – including a 2 day Altair outage at the end of June creating spikes in work and reallocation of resources across both systems. The impact will continue into July performance figures.

Pensions Helpdesk

Helpdesk performance for the period has seen average wait times increase above the non-contractual target of 4 minutes, and the number of calls answered before being abandoned below the aspirational 95 % target.

The Helpdesk had not been running at normal service levels as LPPA continue to experience:

- Record volumes of inbound calls (System migration to UPM, Pensions Increase, P60s, PensionPoint launch).
- Increased call handling time for all UPM calls as call handlers are not familiar with the new system.
- Backlogs of online/email enquiries which leads to more calls being received.

Given the increase in call volumes it remained challenging for the Helpdesk to return to normal service levels. A combination of lower call volumes and tactical solutions deployed to help manage the calls are bringing wait times down. We have also recruited a dedicated trainer to the helpdesk which has resulted in more resource being trained and available to take calls.

Monthly average wait times are trending in the right direction:

- April – 16 minutes • May – 13 minutes • June – 5 minutes • July – 3 minutes

Online Enquiries / E-mails

Pre-Pace Phase 1, business as usual timescales for handling web enquiries and e-mails was typically running at circa 70 % responded to within 24 to 48 hrs. Since the transition of clients to UPM began in January, the handling time has increased to circa 70 % responded to in 5+ days. Performance has been adversely impacted as redeployed email resources to answer calls.

LPPA continue to train additional Helpdesk advisors to provide additional resilience and have recently appointed a Helpdesk training resource, in order to deliver the required training in a more focused way, which will speed up the time from recruitment to deployment on the phones and handling of mailboxes.

Web enquiry and e-mail response times returned to a 24-48hr turnaround time at the end of June 2022.

Fund Membership

In this section…

- Total Fund membership
- Current Age Demographic

TOTAL FUND MEMBERSHIP

TOTAL FUND MEMBERSHIP — CLIENT SPECIFIC

Legend: Active Contributors, Deferred Beneficiaries, Pensioners & Dependants

	Q2 21/22	Q3 21/22	Q4 21/22	Q1 22/23
Total	22,893	22,730	22,993	23,055
Pensioners & Dependants	6,911	6,918	6,967	7,022
Deferred Beneficiaries	9,902	9,809	9,987	9,996
Active Contributors	6,080	6,003	6,039	6,037
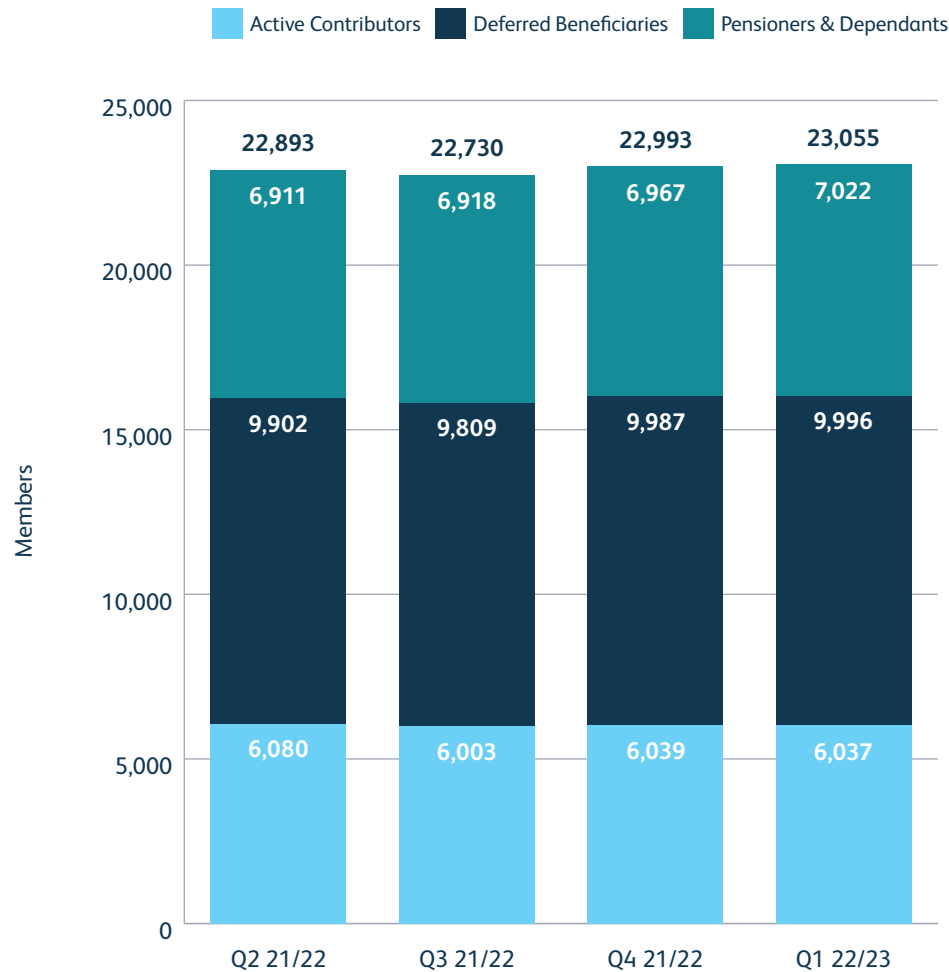
CURRENT AGE DEMOGRAPHIC — CLIENT SPECIFIC

Legend: Under 21, 21 to 30, 31 to 40, 41 to 50, 51 to 60, 61 to 70, Over 70

	Under 21	21 to 30	31 to 40	41 to 50	51 to 60	61 to 70	Over 70
Active	71	720	1,175	1,573	1,793	682	23
Deferred	20	580	1,899	2,638	3,529	1,231	99

Legend: Under 65, 65 to 69, 70 to 74, 75 to 79, 80 to 84, 85 to 89, 90 to 94, 95 to 99, 100+

	Under 65	65 to 69	70 to 74	75 to 79	80 to 84	85 to 89	90 to 94	95 to 99	100+
Pensioners & Dependants	1,401	1,447	1,331	1,068	861	579	264	60	11

Casework Performance Against SLA

In this section…

- Performance – All cases
- Performance Standard

CASEWORK PERFORMANCE AGAINST SLA

PERFORMANCE – ALL CASES   CLIENT SPECIFIC

------ Target (95 %)   **The quarterly SLA performance was 94.7%**

Month	Performance
Jul 21	99.2%
Aug 21	99.7%
Sep 21	97.9%
Oct 21	99.7%
Nov 21	99.6%
Dec 21	97.9%
Jan 22	99.4%
Feb 22	92.3%
Mar 22	95.9%
Apr 22	93.9%
May 22	95.8%
Jun 22	94.5%
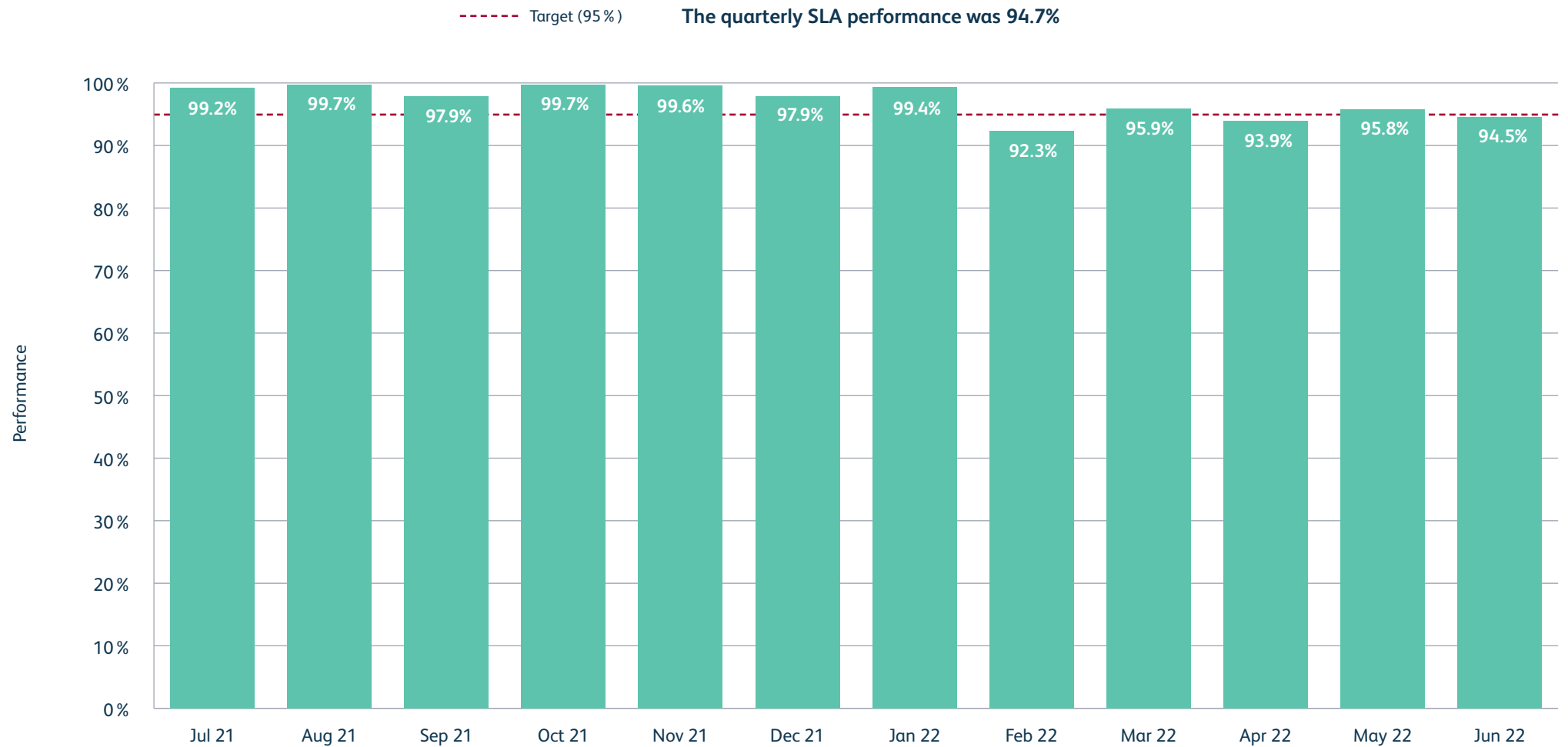
CASEWORK PERFORMANCE AGAINST SLA

PERFORMANCE STANDARD — CLIENT SPECIFIC

Target (95 %)

	SLA target (working days)	Total Processed	Performance
New Starters	10	207	100.0%
Transfer In	10	60	91.7%
Transfer Out	10	108	77.8%
Estimate - Individual	15	64	96.9%
Deferred Benefits	10	162	97.5%
Deaths	5	104	94.2%
Retirement (Active)	5	46	82.6%
Retirement (Deferred)	5	158	96.2%
Refunds	5	135	99.3%
Estimates - Employer	5	59	91.5%
Correspondence	10	90	94.4%
Aggregation	10	103	86.4%
Other		258	98.8%
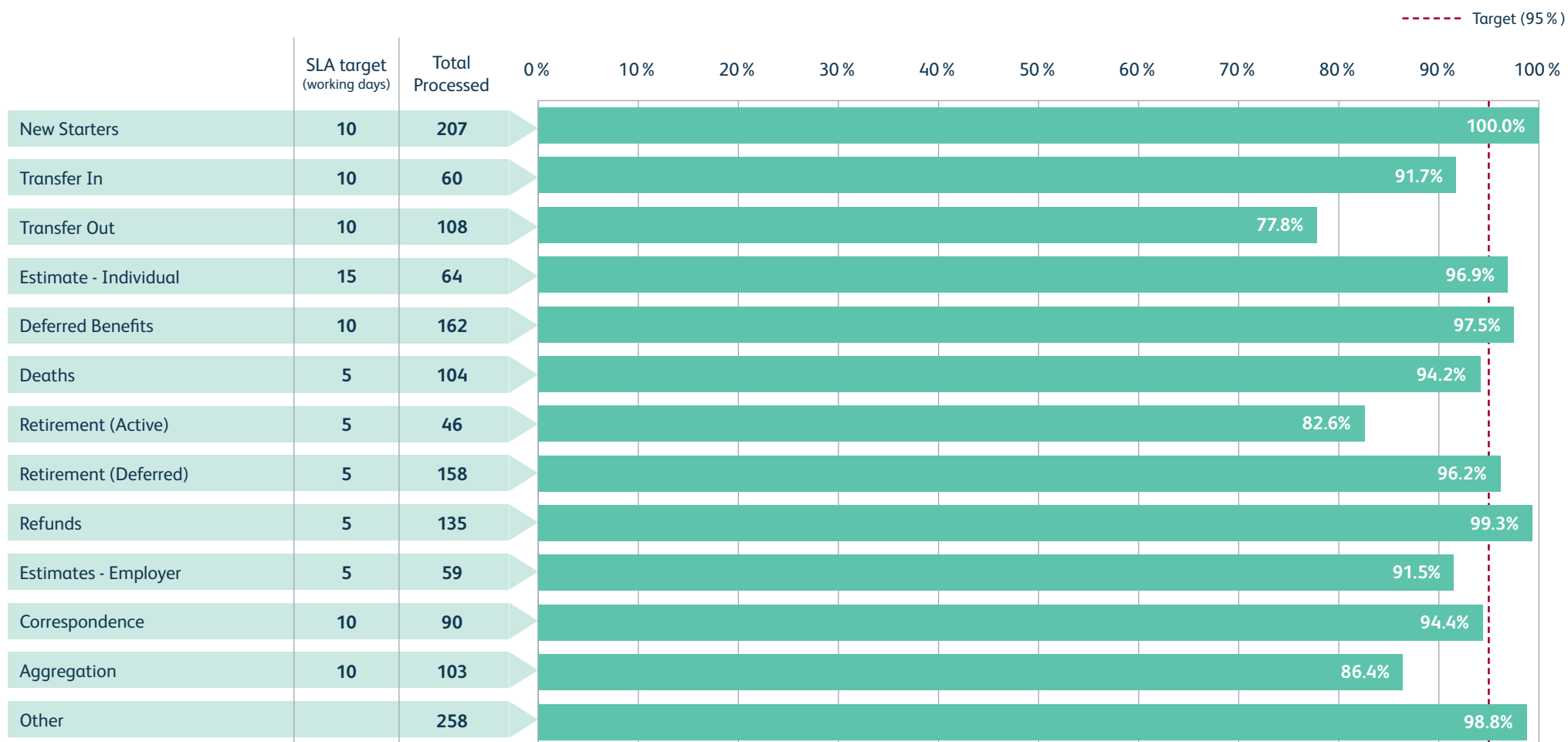
Helpdesk Calls Performance

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 (%)
- Calls answered (volumes)

HELPDESK CALLS PERFORMANCE

WAIT TIME RANGE
ALL LPPA

Legend: Under 2 mins | 2 to 5 mins | 5 to 10 mins | 10 to 15 mins | Over 15 mins

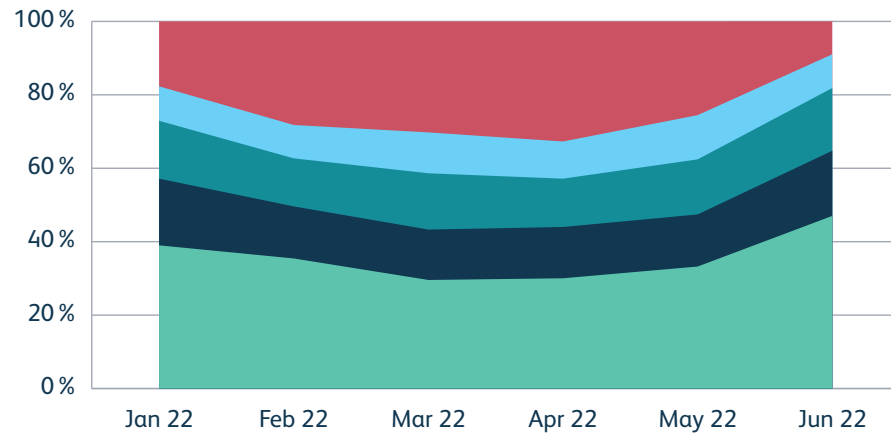|	Under 2 Mins	2 to 5 Mins	5 to 10 Mins	10 to 15 Mins	Over 15 Mins
Jan 22	39.0 %	18.2 %	15.8 %	9.4 %	17.7 %
Feb 22	35.4 %	14.2 %	13.1 %	9.1 %	28.2 %
Mar 22	29.6 %	13.7 %	15.3 %	11.1 %	30.2 %
Apr 22	30.0 %	14.0 %	13.2 %	10.1 %	32.7 %
May 22	33.2 %	14.2 %	15.0 %	12.1 %	25.5 %
Jun 22	47.0 %	17.7 %	17.1 %	9.2 %	9.0 %

CALLS ANSWERED (%)
ALL LPPA

Legend: Performance

Month	Performance
Jul 21	97.4%
Aug 21	97.0%
Sep 21	96.0%
Oct 21	96.3%
Nov 21	97.0%
Dec 21	96.9%
Jan 22	90.1%
Feb 22	85.6%
Mar 22	86.6%
Apr 22	84.6%
May 22	87.8%
Jun 22	94.7%
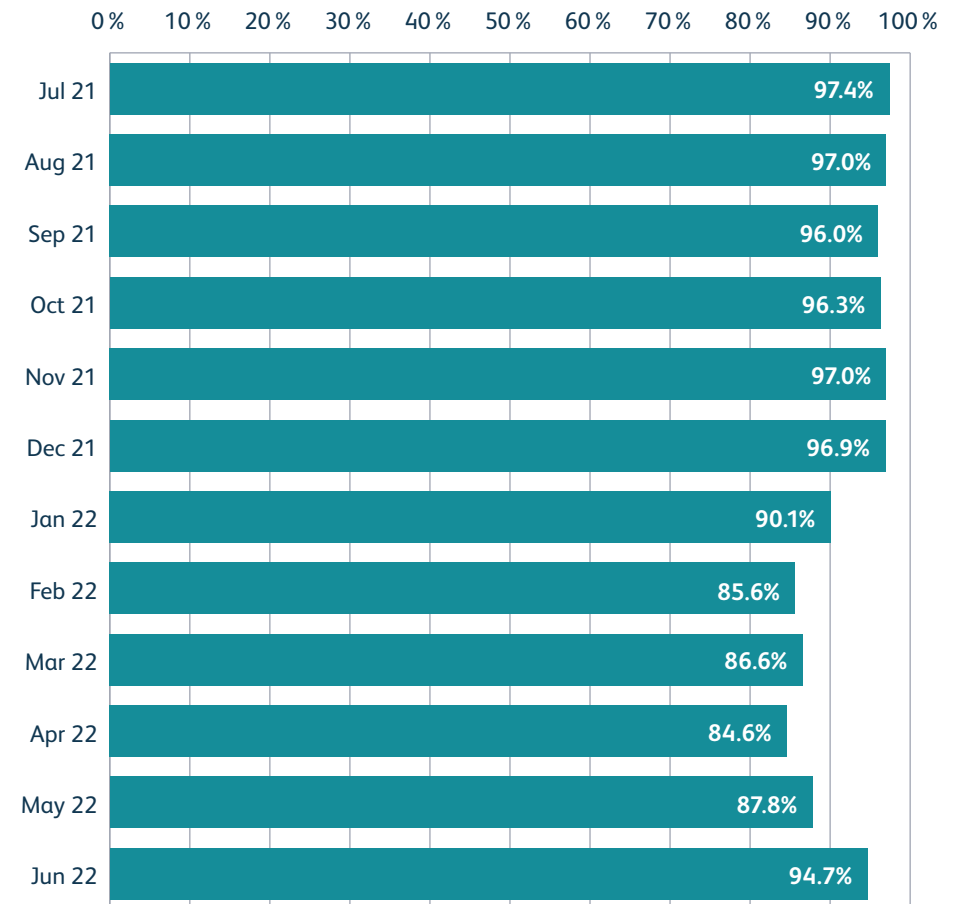
HELPDESK CALLS PERFORMANCE

CALLS ANSWERED (VOLUMES)   ALL LPPA

Average wait time (mm:ss)

	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22
Average wait time	2:57	3:19	3:47	4:05	3:03	3:06	8:47	15:10	13:48	17:19	12:59	5:21
Number of calls answered	8,765	8,395	9,151	8,763	8,947	6,840	12,258	13,223	13,864	14,171	16,317	12,051
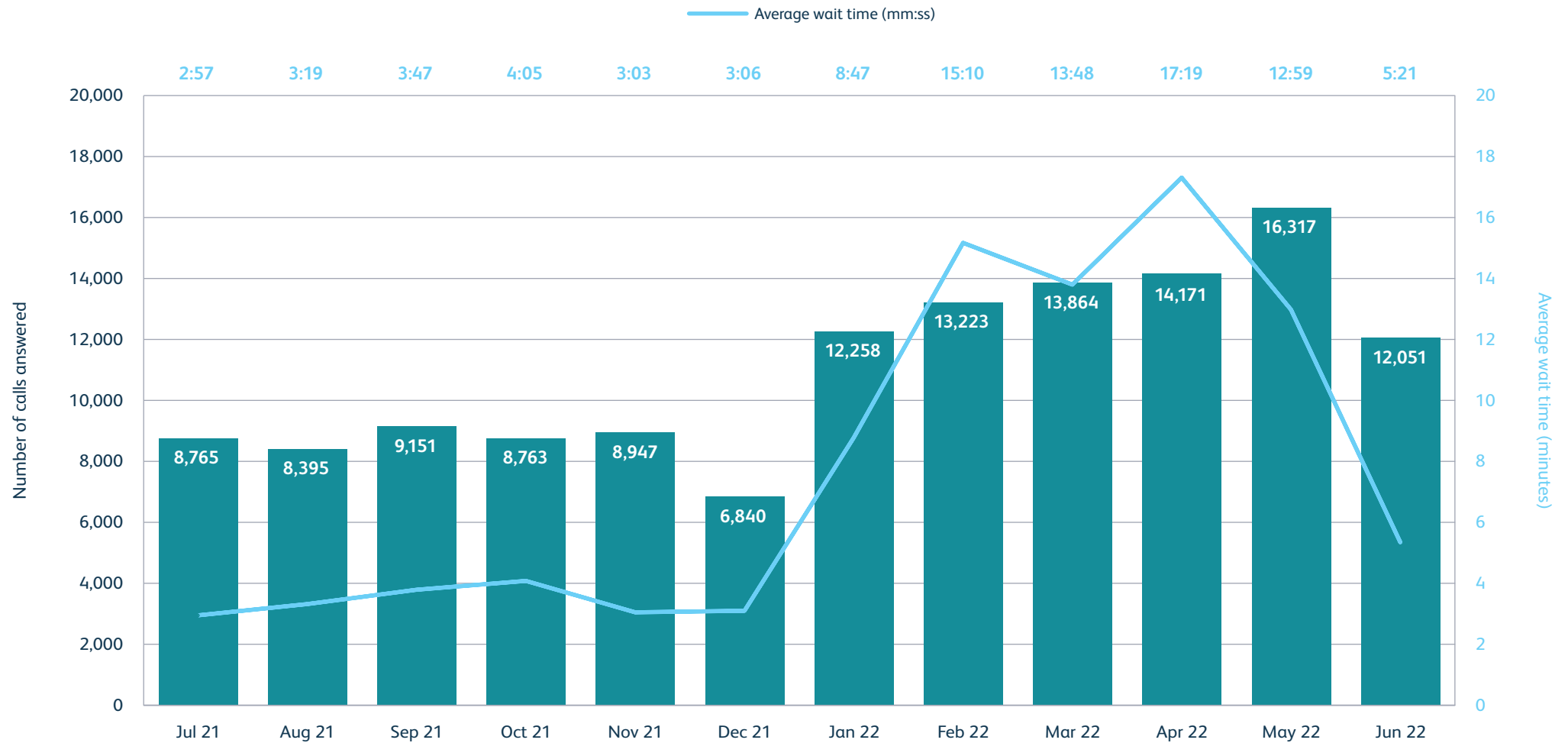
Customer Satisfaction Scores

In this section…

- Helpdesk calls satisfaction
- Retirements
- New joiners

CUSTOMER SATISFACTION SCORES

HELPDESK CALLS SATISFACTION   ALL LPPA

Legend: Dissatisfied | Neutral | Satisfied | Surveys taken

	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22
Surveys taken	613	588	640	572	570	406	542	364	416	385	411	364
Dissatisfied	10.1%	6.0%	10.8%	14.0%	10.5%	6.4%	8.7%	12.6%	16.8%	20.3%	29.9%	23.9%
Neutral	18.8%	14.8%	14.1%	14.0%	13.2%	11.8%	14.9%	17.3%	19.5%	22.1%	16.3%	16.5%
Satisfied	71.1%	79.3%	75.2%	72.0%	76.3%	81.8%	76.4%	70.1%	63.7%	57.7%	53.8%	59.6%
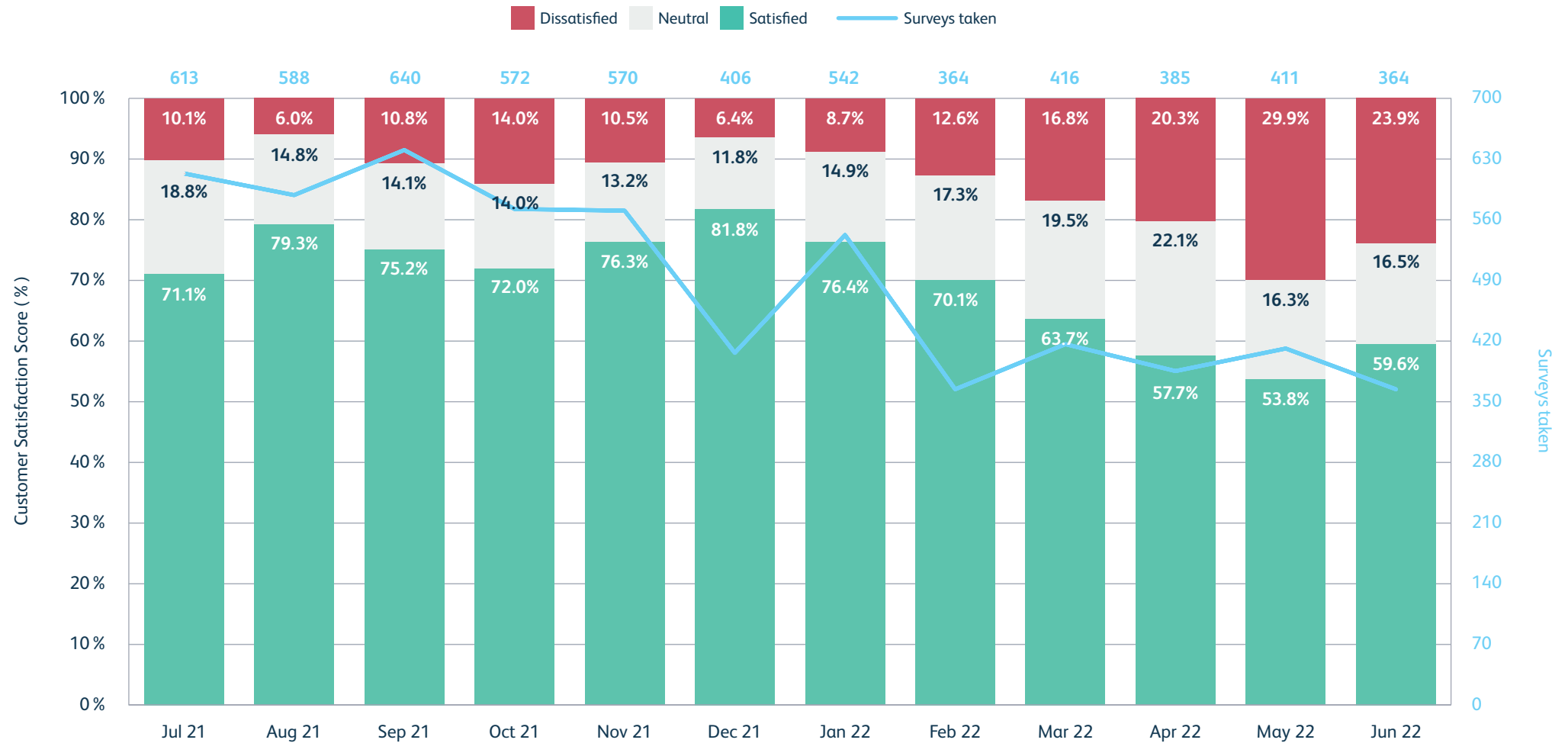
CUSTOMER SATISFACTION SCORES

RETIREMENTS ALL LPPA

Legend: Dissatisfied · Neutral · Satisfied · Surveys taken

Month	Surveys taken	Dissatisfied	Neutral	Satisfied
Jul 21	219	16.9%	6.8%	76.3%
Aug 21	231	18.6%	6.1%	75.3%
Sep 21	262	17.6%	6.9%	75.6%
Oct 21	219	16.9%	8.7%	74.4%
Nov 21	295	12.9%	8.1%	79.0%
Dec 21	180	13.9%	5.6%	80.6%
Jan 22	177	17.5%	9.6%	72.9%
Feb 22	158	19.6%	4.4%	75.9%
Mar 22	199	20.6%	12.1%	67.3%
Apr 22	139	29.5%	7.2%	63.3%
May 22	233	32.2%	7.7%	60.1%
Jun 22	202	26.2%	6.9%	66.8%
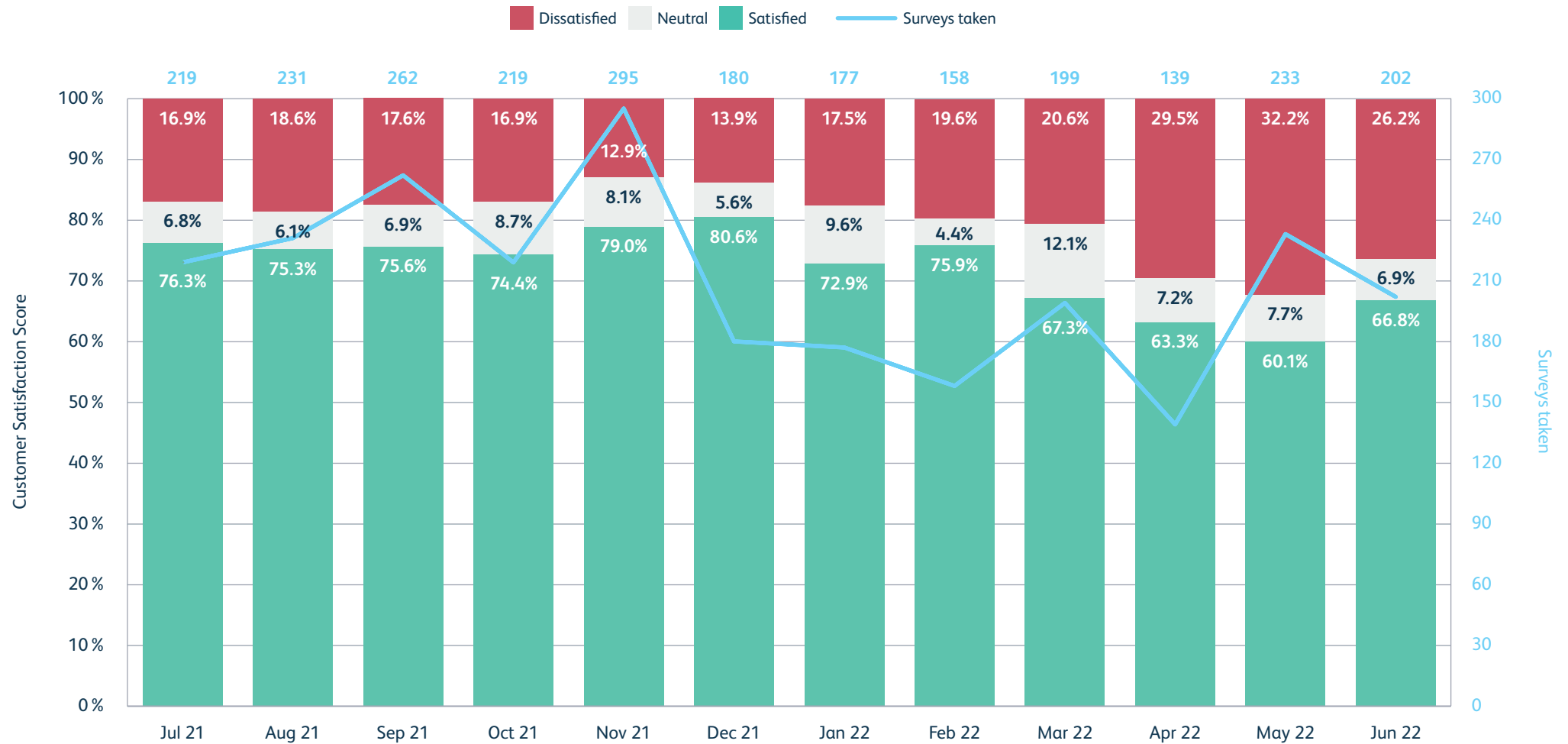
CUSTOMER SATISFACTION SCORES

NEW JOINERS   ALL LPPA

Legend: Dissatisfied | Neutral | Satisfied | Surveys taken

	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22
Surveys taken	14	18	5	12	10	3
Dissatisfied	21.4%	22.2%	40.0%	41.7%	30.0%	
Neutral	28.6%	33.3%		16.7%	30.0%	
Satisfied	50.0%	44.4%	60.0%	41.7%	40.0%	100.0%
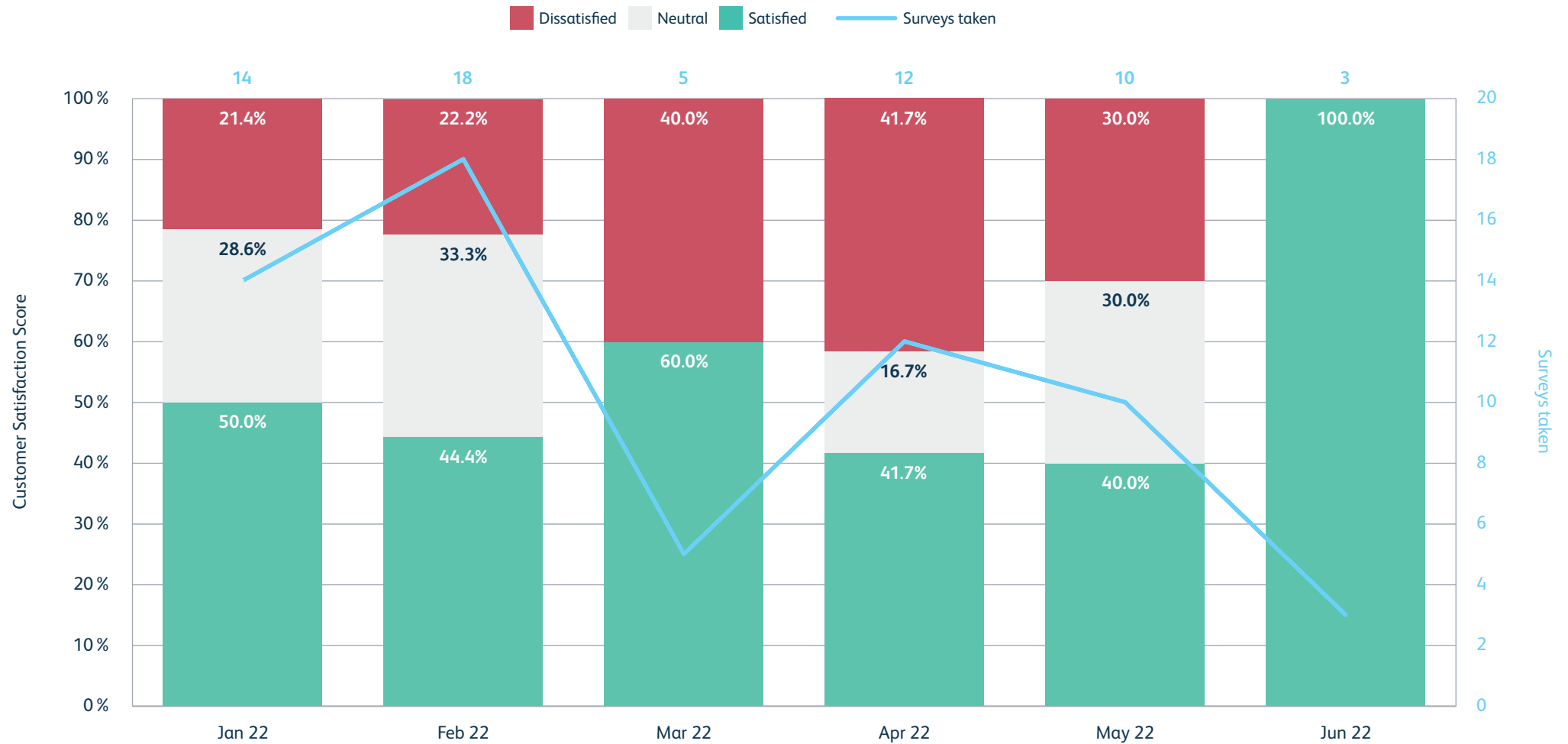
Member Online Portal

In this section…

- Members registered

MEMBER ONLINE PORTAL

MEMBERS REGISTERED

CLIENT SPECIFIC

Legend: Active, Deferred, Pensioner

Members Registered (Member Numbers)

Quarter	Active	Deferred	Pensioner	Total
Q2 21/22	1,420	951	869	3,240
Q3 21/22	1,462	1,007	914	3,383
Q4 21/22	1,526	1,073	978	3,577
Q1 22/23	1,546	1,139	1,064	3,749

% Members

Quarter	Active	Deferred	Pensioner
Q2 21/22	23.4%	9.6%	12.6%
Q3 21/22	24.4%	10.3%	13.2%
Q4 21/22	25.3%	10.7%	14.0%
Q1 22/23	25.6%	11.4%	15.2%
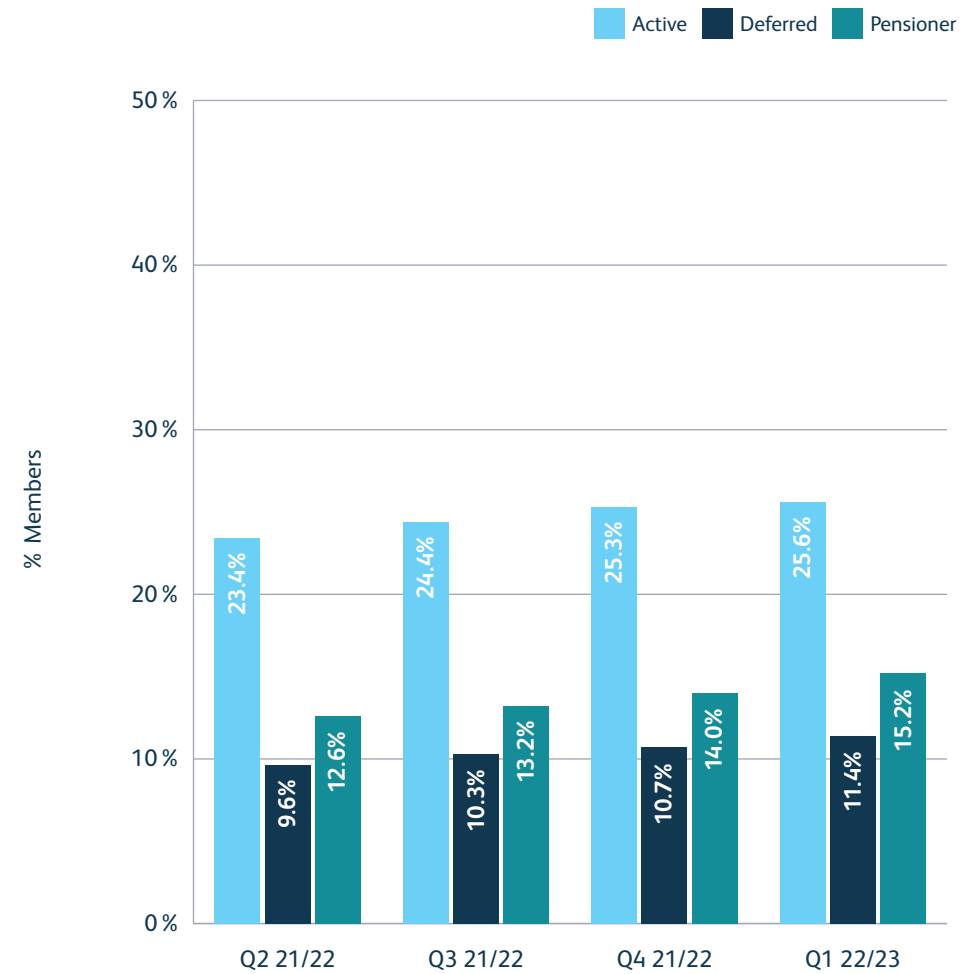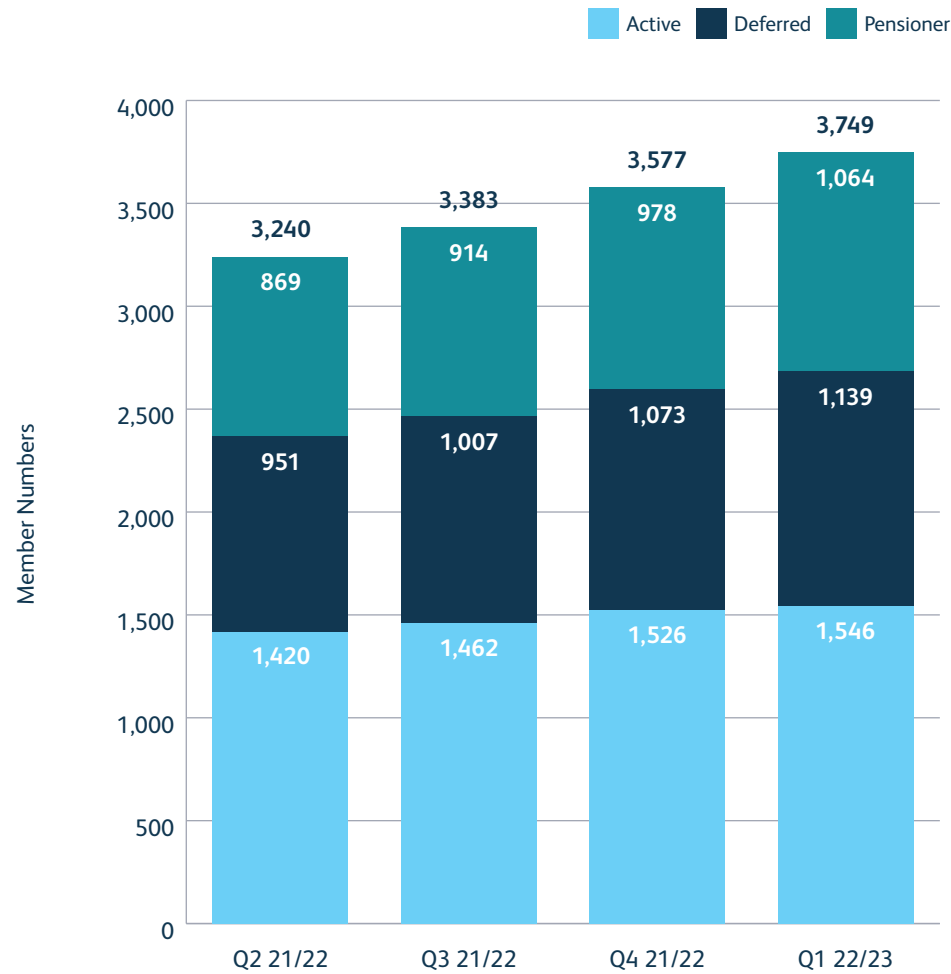
Employer Engagement & Communication Activity

In this section…

- Delivered
- Scheduled
- Engagement communications

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

↘ DELIVERED   ALL LPPA

There have been various communications issued to members in Q1, including:

1. Getting ready for retirement - an email is sent once we have received a member's intention to retire. It advises them of the process and gives them the option to download a retirement checklist and to watch LPPA's **retirement video**

2. Member surveys - emails are sent after retirement, helpdesk interactions, bereavements, and joining the scheme, to allow LPPA to gather feedback and continue to improve the experience across the processing teams

3. P60 emails have been issued to retired members, explaining that their P60s are available to view through their online portal (paper copies have been issued to members who requested them)
   - **Pension Point P60 email**
   - **My Pension Online email**

4. ABS emails for deferred members started to be issued in Q1, before active members are scheduled to receive them in Q2. The email explained that their Annual Benefit Statements is available to view in their online portal (**My Pension Online example**)

5. Spring newsletter – this was made available in a new online format for retired members, and emailed to contactable retired members.
   View spring newsletter (retirees)

6. **Additional member video guides** (LPPA website) – these have been added to the LPPA YouTube channel including 'How to use the PensionPoint Retirement calculators' (videos have been important in supporting the launch of PensionPoint, the new online member portal)

7. Welcome to the Engagement Team email – this was issued and introduced some new LPPA team members and how they can offer employer support.
   View Engagement Team email

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

8. Pension Pulse employer newsletters sent out in April and May
   - **April Pension Pulse**
   - **May Pension Pulse**

9. A new employer training page has been created and included on the LPPA website (making it easier for employers to book ongoing training sessions).
   View new training page

The Employer Engagement team has continued to deliver employer support sessions including:

10. Scheme Leavers Essentials training – for any employers in need of support with submitting leaver details to LPPA, this session cover what to do and how to do it

11. LGPS Scheme Essentials – for any employer that wants more knowledge of the LGPS pension scheme and support with calculating final pay, CARE pay and Absence and Pensionable Pay

12. Year-end file submission training and support for UPM employers

There have also been training sessions delivered to members (all bookable via the LPPA website member training page) including:

13. Making Sense of your Pension (online sessions) - these are aimed at members to help improve their knowledge of their LGPS pension, whether they have recently joined the scheme, or have been in the scheme a while

14. Making Sense of Retirement (online sessions) – these are aimed at Members who are reaching retirement age (age 55 and over) to help improve their knowledge of the retirement process and claiming their LGPS pension

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

1. ABS activity (ongoing) – emails will continue to be issued to encourage active members to access their ABS through their online portal

2. **Active member online newsletter** – this will be emailed to active members across July and August

3. Employer toolkit (pilot) - support and resources for employers to engage with their active members

4. The LPPA employer engagement team will be arranging visits with employers, including targeted visits with those who have been identified as requiring additional support

5. All employer visits (training sessions, support meetings) will continue to be delivered remotely in 22/23. The Engagement team have continued to build on the successful delivery of these sessions during the last two years – the team has adapted the delivery of these sessions to increase the reach across large numbers of employers, and receive positive feedback and satisfaction scores (online training sessions are surveyed with participants)

6. With the launch of UPM Phase 2 (Project PACE) from October, the Q2 period will be focused on training employers on how to use the new employer portal. Employer communications for Q2 will have a strong focus on the move to UPM, with training invites, videos and online resources being communicated

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

ENGAGEMENT COMMUNICATIONS   CLIENT SPECIFIC

- Employer visits were held with 2 Brent Pension Fund employers

- Scheme Leavers Training was delivered and 1 employer within Brent Pension Fund attended

- 1 employer within the Brent Pension Fund attended an Employer Scheme Essentials training session

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

EMPLOYERS
CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
04 May	Barnardos	Employer Visit (support)	1
24 May	Princess Frederica CE VA Primary School	Scheme Essentials (Employer Training)	2
08 Jun	JFS School	Employer Visit (support)	1
14 Jun	Fawood Children's Centre	Scheme Leavers Training	1

EMAILS – EMPLOYERS
CLIENT SPECIFIC

Date	Message / Campaign	Call to Action
APRIL	Year end bulletin	Information
	Welcome to the Engagement Team	Information
	My PensionOnline: Currently Unavailable	My Pension Online
	Submitting your end of year data EOY	Information
	Pension Pulse	Information
MAY	Pension Pulse	Information
	Scheme leavers training invite	Booking
	Have your say with LPPA	Survey
JUNE	PensionPoint promotional email	PensionPoint
	Project PACE - getting ready for our new pension administration system	PACE
	Update on end of year queries	Information
	Employer Panel email	Survey
	LPPA address reminder	Information

EMAILS – MEMBERS
CLIENT SPECIFIC

Date	Message / Campaign	Call to Action
APRIL	Pension Estimate: MPO	Information
MAY	Annual Benefit Statement	Information
	Annual pension statement	Information
	Member panel email and survey	Survey

Data Quality

In this section…

- Common data
- Conditional data

DATA QUALITY (TPR SCORES)

COMMON DATA — CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	3	73	29
Surname	0	0	0
Forenames/Initials	0	6	6
Sex	0	0	0
DOB	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 status event	0	0	0
Address	21	528	35
Postcode	22	574	48
Total Fails	46	1,181	118
Individual Fails	25	647	77
Total Members	6,037	9,996	7,022
Accuracy Rate	99.6%	93.5%	98.9%
Total accuracy rate			96.8%

CONDITIONAL DATA — CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	4
AVC's/Additional Contributions	0
Deferred Benefits	0
Tranches (DB)	636
Gross Pension (Pensioners)	18
Tranches (Pensioners)	844
Gross Pension (Dependants)	20
Tranches (Dependants)	18
Date of Leaving	17
Date Joined Scheme	0
Employer Details	0
Salary	313
Crystallisation	98
Annual Allowance	192
LTA Factors	0
Date Contracted Out	16
Pre-88 GMP	536
Post-88 GMP	942
Total Fails	3,654
Individual Fails	3,007
Total Members	23,055
Total accuracy rate	87.0%

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