

# Quarterly Administration Report

**Brent Pension Fund**

1 January - 31 March 2025

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# DEFINITIONS

## Page 9

### Total Fund Membership

Total Fund Membership is the number of member records held on the LPPA pensions administration system that are contributing to, awaiting, or receiving benefits from the pension fund.

## Page 10

### 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 12

### 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 13

### Casework Performance - Standard

'Deaths' are included as a specific process, but it is important to highlight that processing can take a significant amount of time to complete fully. Furthermore, there can be seasonal aspects which impact case volumes ie. higher mortality rates during winter.

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

- APC/AVC Queries
- Additional Confs Cessation
- Change of Hours
- Change of Personal Details
- Under Three Month Opt-Out
- Main to 50/50 Scheme Changes
- Ill Health Reviews
- Complaints

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 14

### 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 are not limited to, the deletion of a process, or changes to the process category that a case is assigned to).

From Q1 2024/25, "Deaths" include over / under payments, and updates to pension and payroll processes (multiple associated processes can be triggered within a case, including the setup of multiple beneficiaries, and making multiple payments to individuals).

## Page 20 & 21

### Contact Centre Performance

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

## Page 23 & 24

### Contact Centre Call Satisfaction

Members are given the option to answer two questions, following a call with the LPPA Contact Centre (these relate to general satisfaction with LPPA, and satisfaction with the adviser they have spoken to – both responses follow a three-point rating scale).

## Page 25 & 26

### Retirement Satisfaction

Graphs show a breakdown of quarterly retirement surveys (emails issued and responses received).

- Retirements processed / completed - members can have multiple process counts.
- Surveys issued - does not equal retirement processes for several reasons; ill health retirements do not receive a survey; not all members provide an email address; members with multiple retirement processes only receive one survey email; there is a planned delay in issuing surveys to allow for initial payments to be paid).

Satisfaction / Dissatisfaction is included as a % of email surveys issued. This demonstrates that a significant number of surveys are not completed (work is ongoing to encourage an increase in the number of responses to email surveys issued).

The Satisfaction Scores highlighted in green and red compare the satisfied / dissatisfied responses received, as a % of total survey responses - this is the true measure of member satisfaction.

Satisfied responses include satisfied (with the service) and very satisfied.

Dissatisfied responses include dissatisfied and very dissatisfied.

## Page 28

### Member Online Portal

The number of member records by status, that are registered for LPPA's member self-service portal, PensionPoint.

## Page 34

### 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 (basic details that are specific to the Member) and Scheme Specific Data (data that is related to a member's data and specific circumstances surrounding their record).

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](#) (The Pensions Regulator) 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.



## STATUTORY DEADLINES

✓ COMPLETED    📅 DUE

	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25
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							✓					



# EXECUTIVE SUMMARY

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

**This performance report covers the reporting period of Q4 2024/25 (January – March 2025)**

## Casework SLA performance

Overall operational casework performance was 98.6 % against overall Service Level Agreements (SLAs) for the quarter. Focus continues to be on driving further improvements to the member experience.

## Contact Centre

Contact Centre wait times have been consistently under the targeted 4-minute wait time with an average wait time over the quarter of 3 minutes 22 seconds.

## Satisfaction scores

The majority of those surveyed about their retirement experience do not respond. Of those that responded to the survey, customer satisfaction was 66.7 % for Actives into Retirement and 33.3 % for Deferred into payment. Low survey responses can lead to high volatility in the satisfaction scores.

Contact Centre satisfaction now includes both overall satisfaction and satisfaction with the individual call handler that the member spoke to. Satisfaction with the individual call handler is typically higher than overall satisfaction, with satisfaction rates for the quarter at 92.6 % and 78.7 % respectively.

## Statutory deadlines

There were no regulatory and statutory deadlines due in the reporting period.

## Outlook

Activity levels are, and are expected to remain high, due to:

- Embedding of monthly returns for all employers and managing the associated spikes in work driven by the late and concentrated submission of monthly return files from some employers
- Efficiency and Service Improvement Programme (ESIP) of work.
- Activity to continue to improve the member experience in key areas.
- Significant regulatory change including implementation of McCloud remedy and the Pensions Dashboard.
- Preparation for LG valuation data submission in 2025.



## LPPA PROJECTS - UPDATE

### McCloud Remedy

Following the McCloud judgment, changes to all public service pension schemes that provided transitional protections to older members, including the LGPS came into force on 1 October 2023. The changes were designed to rectify unlawful discrimination against younger scheme members.

In the LGPS, the impact is an extension of the underpin to all eligible members. The national timeline for revisiting all member cases is Oct 23 – Aug 25.

A dedicated project manager and team remains in place overseeing and delivering all the key areas of the project including:

- Data capture and data cleanse from employers to ensure that hour changes and service breaks have all been recorded correctly.
- System design and development is thoroughly tested prior to release into the live environment.
- Appropriate communication plans are in place and delivered.
- Contact Centre and Operational colleague training and business readiness.

### Current Position

- Eligibility flags are in place to identify all members in scope for remedy.
- We are calculating benefits and applying the underpin for active members retiring (for those members with a McCloud eligible flag, and whose data has been verified as being present and correct).
- Of those cases where the underpin applies, early results show that the underpin is driving a small increase in benefits (c.£280pa on average) in a small number of cases (c.4.5 % of cases) and those cases are where the member had a significant salary increase in the remedy period and/or retired early.

### Efficiency and Service Improvement Programme

LPPA mobilised an Efficiency and Service Improvement Programme (ESIP) shortly after the move to the new administration system (UPM). ESIP is designed to leverage the investment in UPM, delivering automation and improved self-service capability and member experience.

Across all LPPA clients, the number of fully automated cases surpassed 3k in a month for the first time in January 2025. Automated processes include active and deferred retirement quotes, deferred statements for leavers and refunds.

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

Online retirement forms were delivered in February (for members to access through PensionPoint) and will be rolled out for all Funds by the end of Q1 2025.

Work continues on the automation of the deferred retirements payment process (following previous automation that was delivered to produce deferred retirement quotes). This is the fifth ESIP automation and will be followed by automation for the payment process for CARE only active retirements.

Bank validation account name check is in testing, to be rolled out in Q1 2025.

Other activity in flight includes work to improve the monthly returns process and the member and employer online portals.

### Data Project

LPPA is partnering with Civica and Intellica on a data project to improve data quality ahead of valuation and the introduction of the Pensions Dashboard.

Data Validation Checks (DVCs) that check the integrity of member data have been run and LPPA have met with Funds and shared the results. Follow up sessions are planned for May 2025

The project continues to work towards producing a series of dashboards to give us clear visibility of the integrity and accuracy of the data that we hold to comply with regulatory change and to enable us to launch more self-service and automation for members and employers.

### Pensions Dashboard

The Pensions Dashboard will enable individuals to access their pensions information online, securely and all in one place. The connection date for public sector schemes to connect to the Pensions Dashboard is 31 October 2025. The dashboard project is in flight with a full-time project manager. Work is well underway on the project, including:

- Systems requirements (including the rules for partial matching of records and the treatment of AVCs); and the business readiness aspects of the project (e.g. readiness to deal with new inbound enquiries relating to dashboard).
- Civica are LPPA's Integrated Service Provider (ISP) for dashboard connection.
- Regular LPPA round table meetings being held with Funds to share updates.

# Fund Membership

## In this section...

- Total fund membership
- Current age demographic

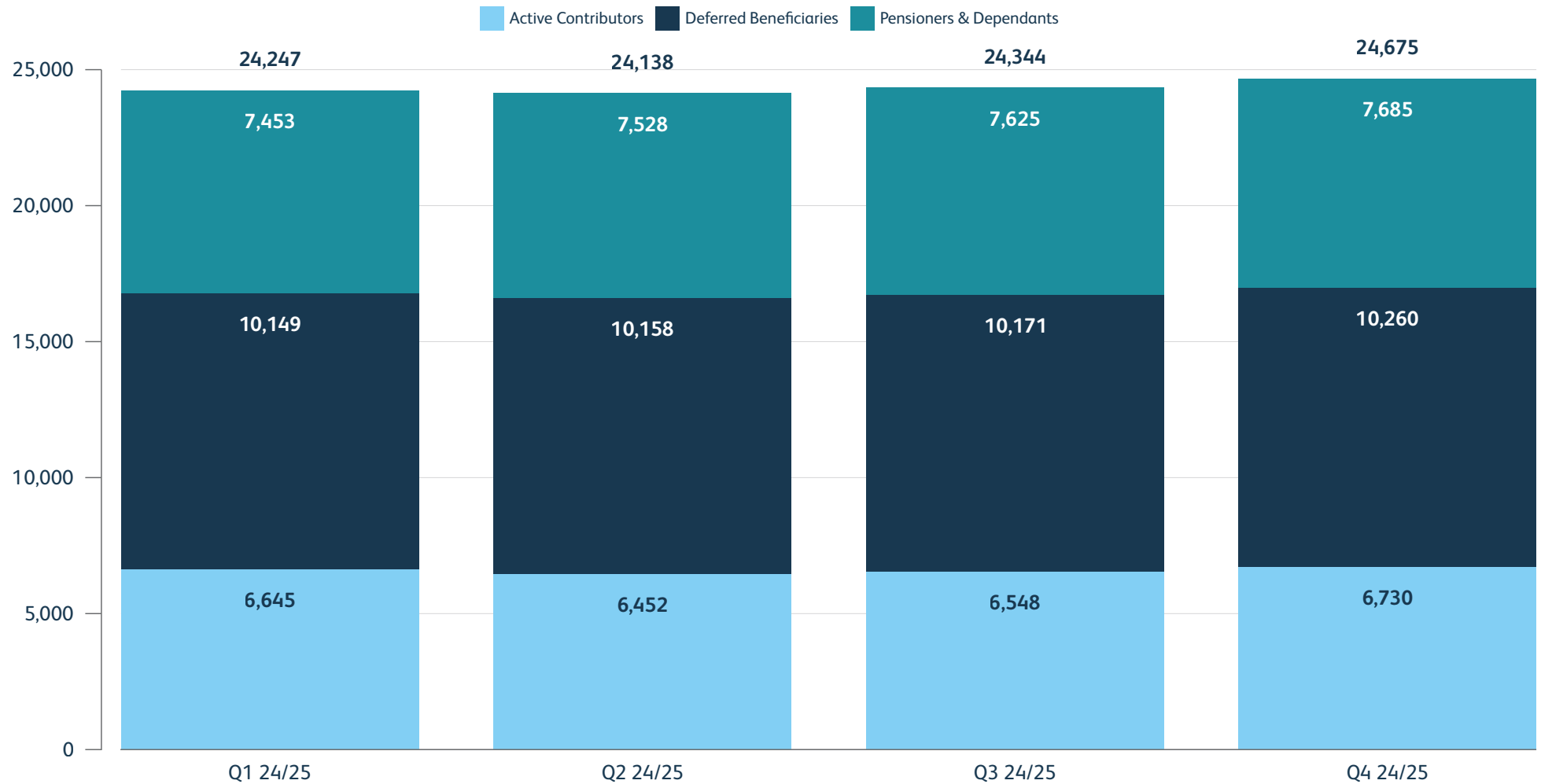


# TOTAL FUND MEMBERSHIP



## TOTAL FUND MEMBERSHIP

### CLIENT SPECIFIC

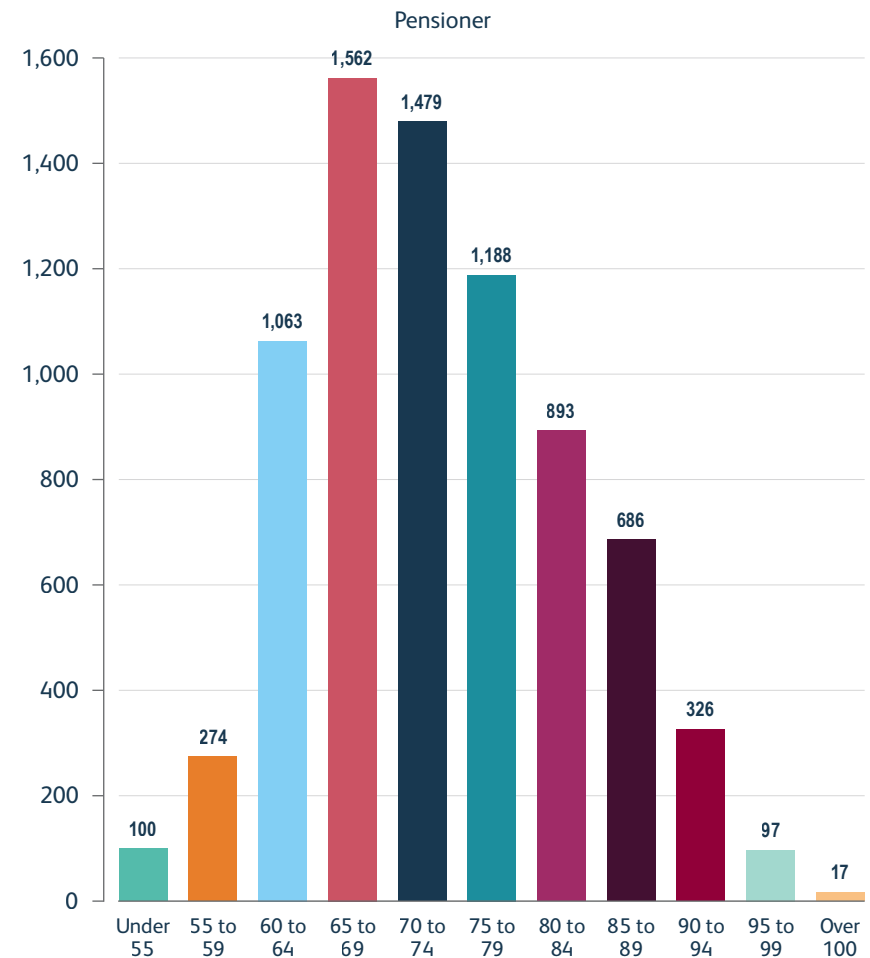
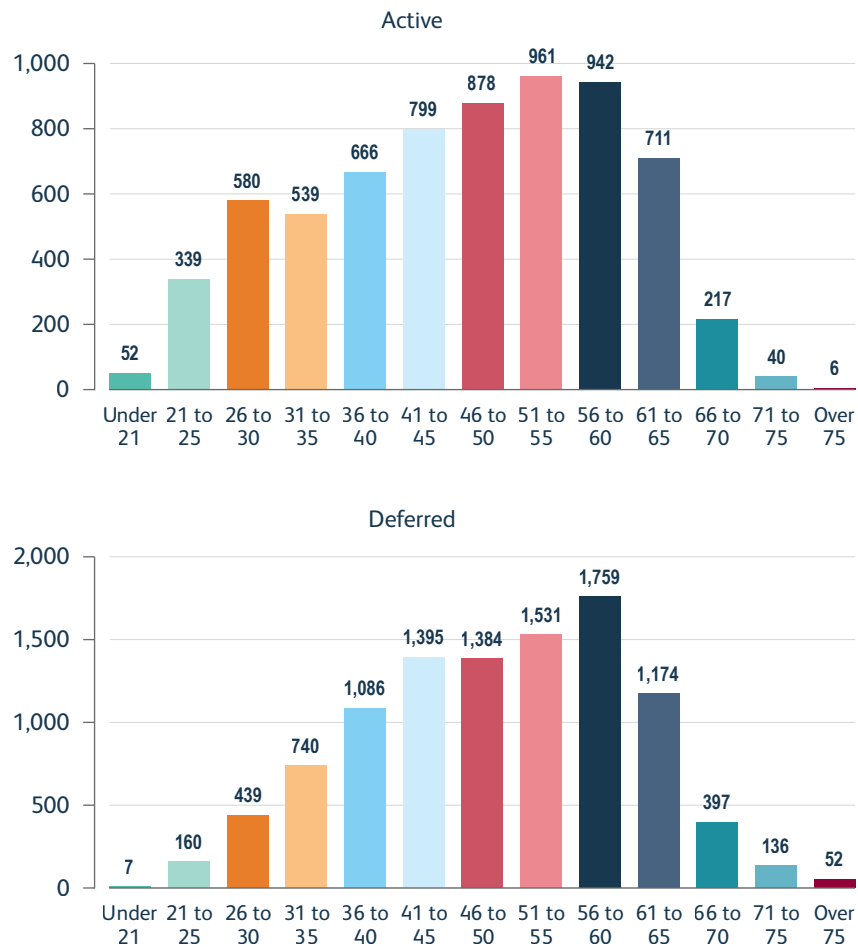


# TOTAL FUND MEMBERSHIP



## CURRENT AGE DEMOGRAPHIC

CLIENT SPECIFIC



# Casework Performance

## **In this section...**

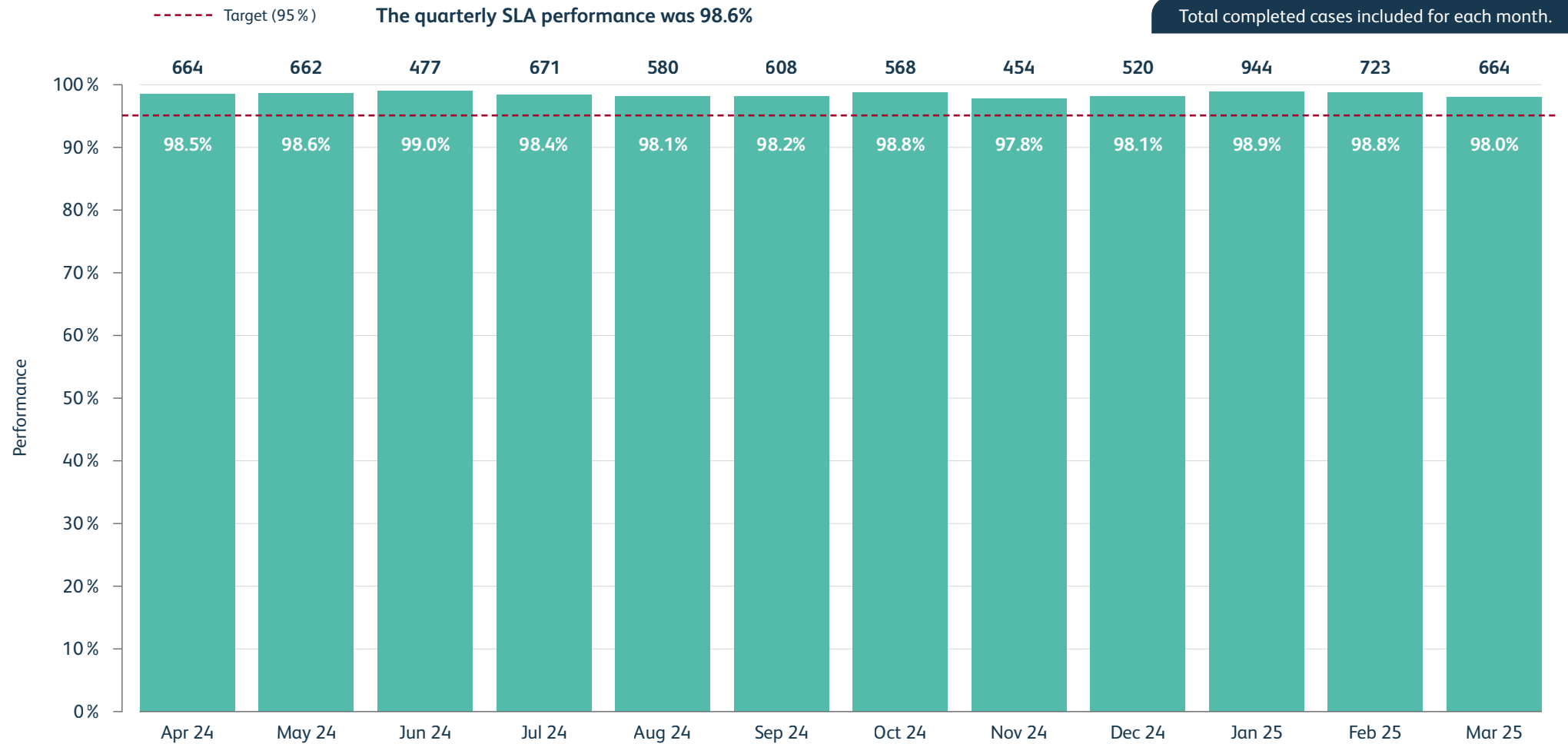
- Performance – all cases
- Performance standard
- Ongoing casework at the end of the reporting quarter

# CASEWORK PERFORMANCE



## PERFORMANCE – ALL CASES

CLIENT SPECIFIC



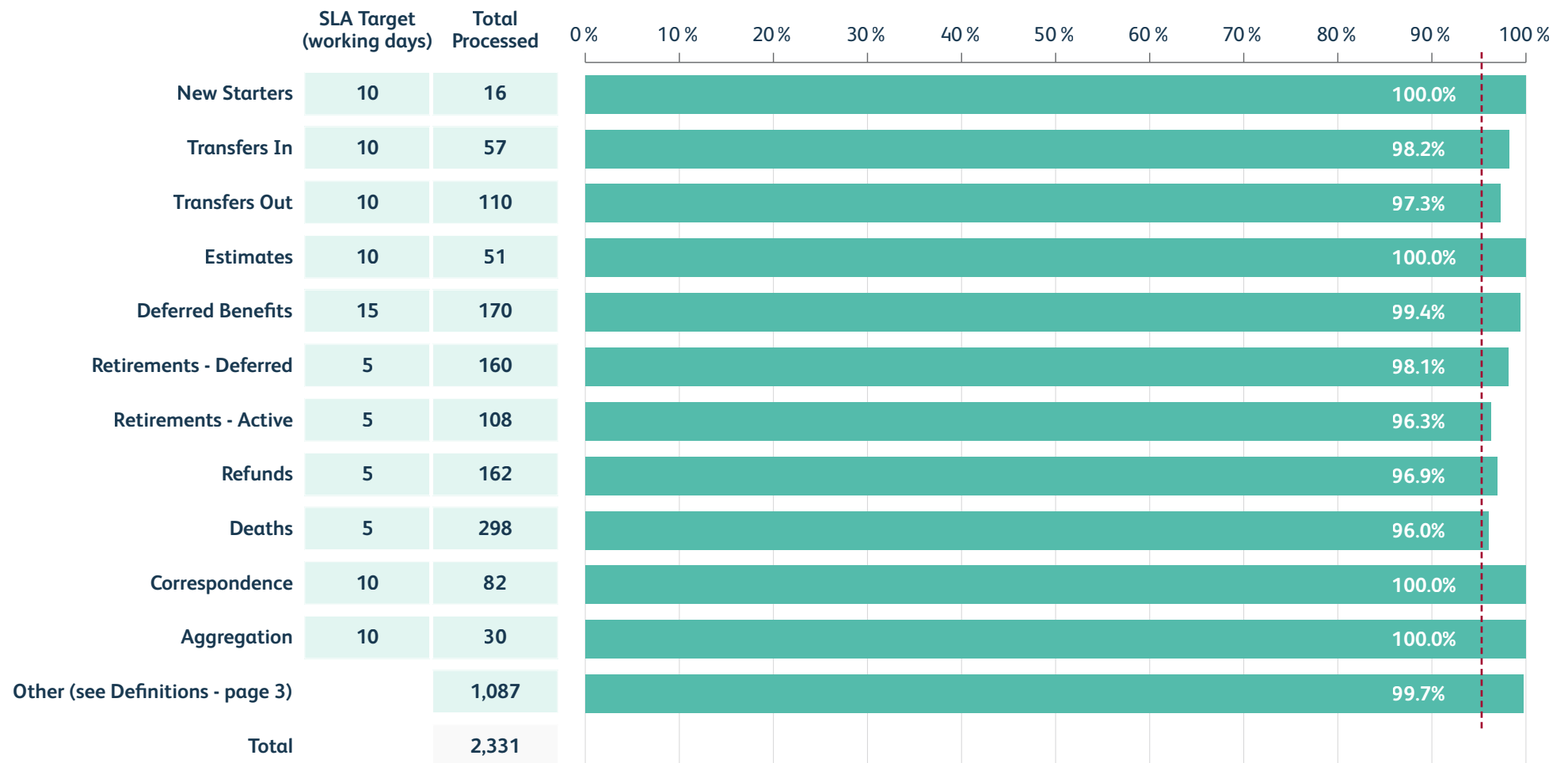
# CASEWORK PERFORMANCE



## PERFORMANCE STANDARD

## CLIENT SPECIFIC

----- Target (95%)



# 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 01/01/25	Received (Inbound)	Completed (Outbound)	Outstanding as of 31/03/25
New Starters	2	19	21	0
Transfers In	192	162	115	239
Transfers Out	239	200	157	282
Estimates	13	59	56	16
Deferred Benefits	315	306	310	311
Retirements - Deferred	151	196	200	147
Retirements - Active	82	211	176	117
Refunds	99	219	229	89
Deaths	499	382	372	509
Correspondence	135	194	225	104
Aggregation	100	159	67	192
Other	73	1,104	1,111	66
Total	1,900	3,211	3,039	2,072



# Active to Retirement Processes - First Payment Within 30 Days

## **In this section...**

- Employer retirement notifications - notified on-time vs. late
- On-time notification - first payment
- Late notification - first payment

## ACTIVE TO RETIREMENT

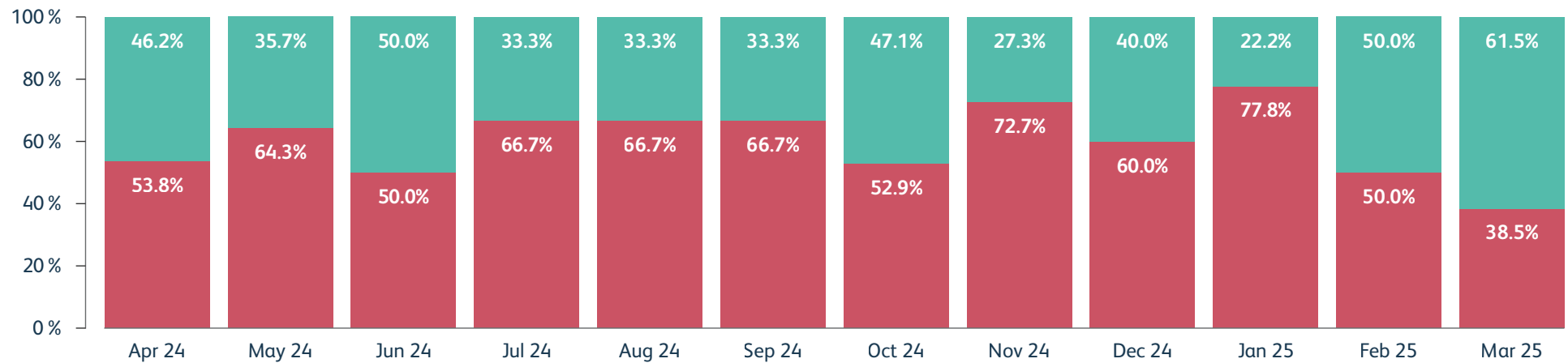
### Please note:

LPPA require at least 30 days notice prior to an active member retirement date, to be able to pay a member their first payment within 30 days of their retirement date. The chart below shows the number / % of on-time notifications vs. the number / % of late notifications from employers in the month (late being received within 30 days or after the retirement date).



### EMPLOYER RETIREMENT NOTIFICATIONS

### CLIENT SPECIFIC



	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25
Retirement Notifications	13	14	6	6	9	12	17	11	5	9	4	13
Received On-Time (Number)	6	5	3	2	3	4	8	3	2	2	2	8
Received On-Time ( % )	46.2 %	35.7 %	50.0 %	33.3 %	33.3 %	33.3 %	47.1 %	27.3 %	40.0 %	22.2 %	50.0 %	61.5 %
Received Late (Number)	7	9	3	4	6	8	9	8	3	7	2	5
Received Late ( % )	53.8 %	64.3 %	50.0 %	66.7 %	66.7 %	66.7 %	52.9 %	72.7 %	60.0 %	77.8 %	50.0 %	38.5 %

Data based on retirement notifications received from employers in the month.

# ACTIVE TO RETIREMENT

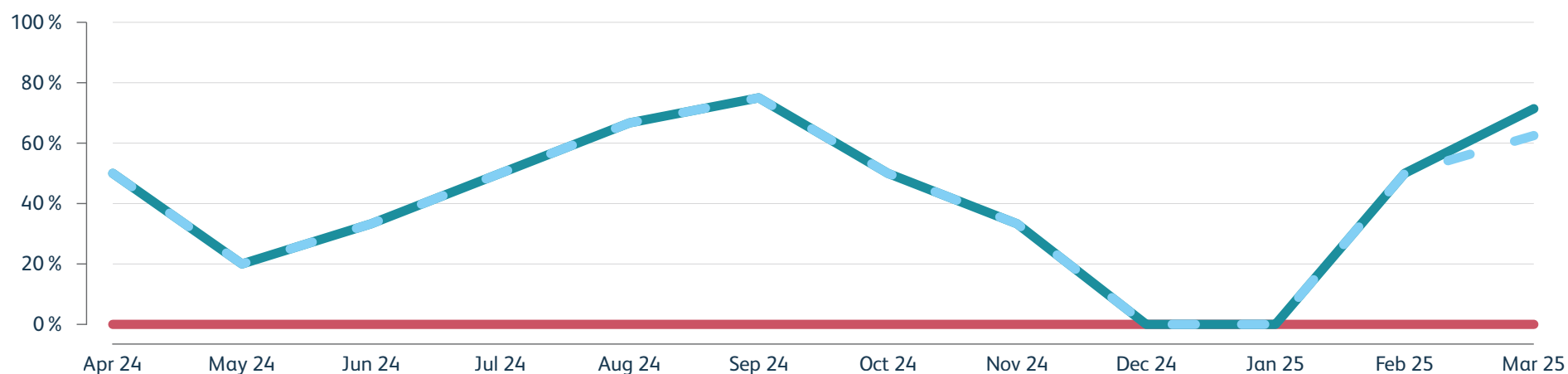
## Please note:

% of first payments made within 30 days of retirement date – where LPPA receives the leaver notification from the employer with at least 30 days notice.



## ON-TIME NOTIFICATION - FIRST PAYMENT

CLIENT SPECIFIC



	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25
No. of payments made where member has an AVC	0	0	0	0	0	0	0	0	0	0	0	1
No. of payments made with <b>no</b> AVC	6	5	3	2	3	4	8	3	2	2	2	7
% of payments made within 30 days – with AVC	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0.0 %
% of payments made within 30 days – <b>no</b> AVC	50.0 %	20.0 %	33.3 %	50.0 %	66.7 %	75.0 %	50.0 %	33.3 %	0.0 %	0.0 %	50.0 %	71.4 %
% of payments made within 30 days – combined	50.0 %	20.0 %	33.3 %	50.0 %	66.7 %	75.0 %	50.0 %	33.3 %	0.0 %	0.0 %	50.0 %	62.5 %

Data based on processes completed in the month.

Measurement is based on the earliest payment made, i.e. earliest of first pension payment or lump sum.

# ACTIVE TO RETIREMENT

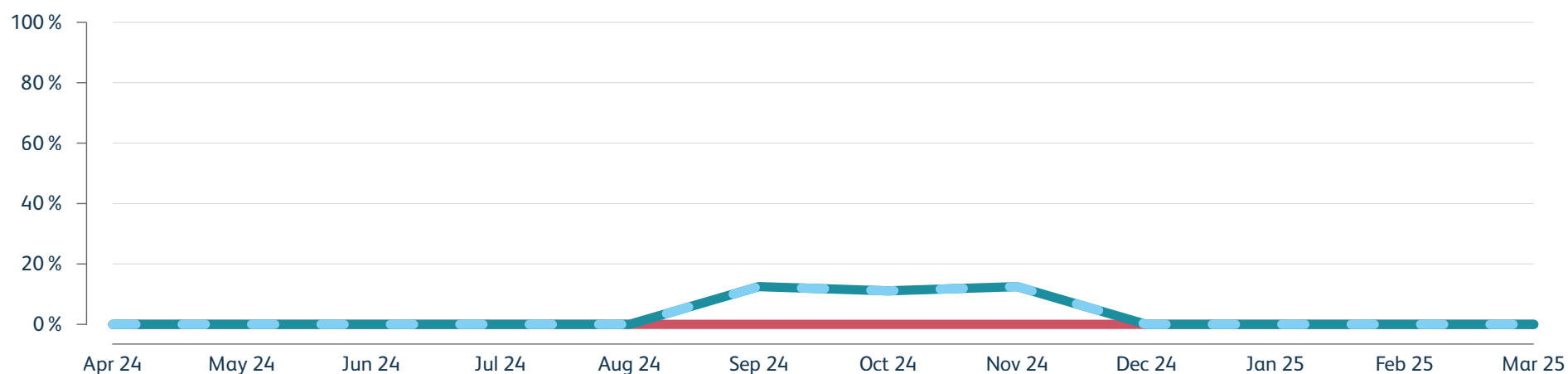
## Please note:

% of first payments made within 30 days of retirement date – where LPPA receives the leaver notification from the employer with less than 30 days notice, or after the actual retirement date.



## LATE NOTIFICATION - FIRST PAYMENT

CLIENT SPECIFIC



	Apr 24	May 24	Jun 24	Jul 24	Aug 24	Sep 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25
No. of payments made where member has an AVC	0	0	0	0	0	0	0	0	0	0	0	0
No. of payments made with <b>no</b> AVC	7	9	3	4	6	8	9	8	3	7	2	5
% of payments made within 30 days – with AVC	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
% of payments made within 30 days – <b>no</b> AVC	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	11.1%	12.5%	0.0%	0.0%	0.0%	0.0%
% of payments made within 30 days – combined	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%	11.1%	12.5%	0.0%	0.0%	0.0%	0.0%

Data based on processes completed in the month.

Measurement is based on the earliest payment made, i.e. earliest of first pension payment or lump sum.

# Contact Centre Calls Performance

The Contact Centre deals with all online enquiries and calls from members for all funds that LPPA provides administration services for.

## **In this section...**

- Wait time range
- Calls answered

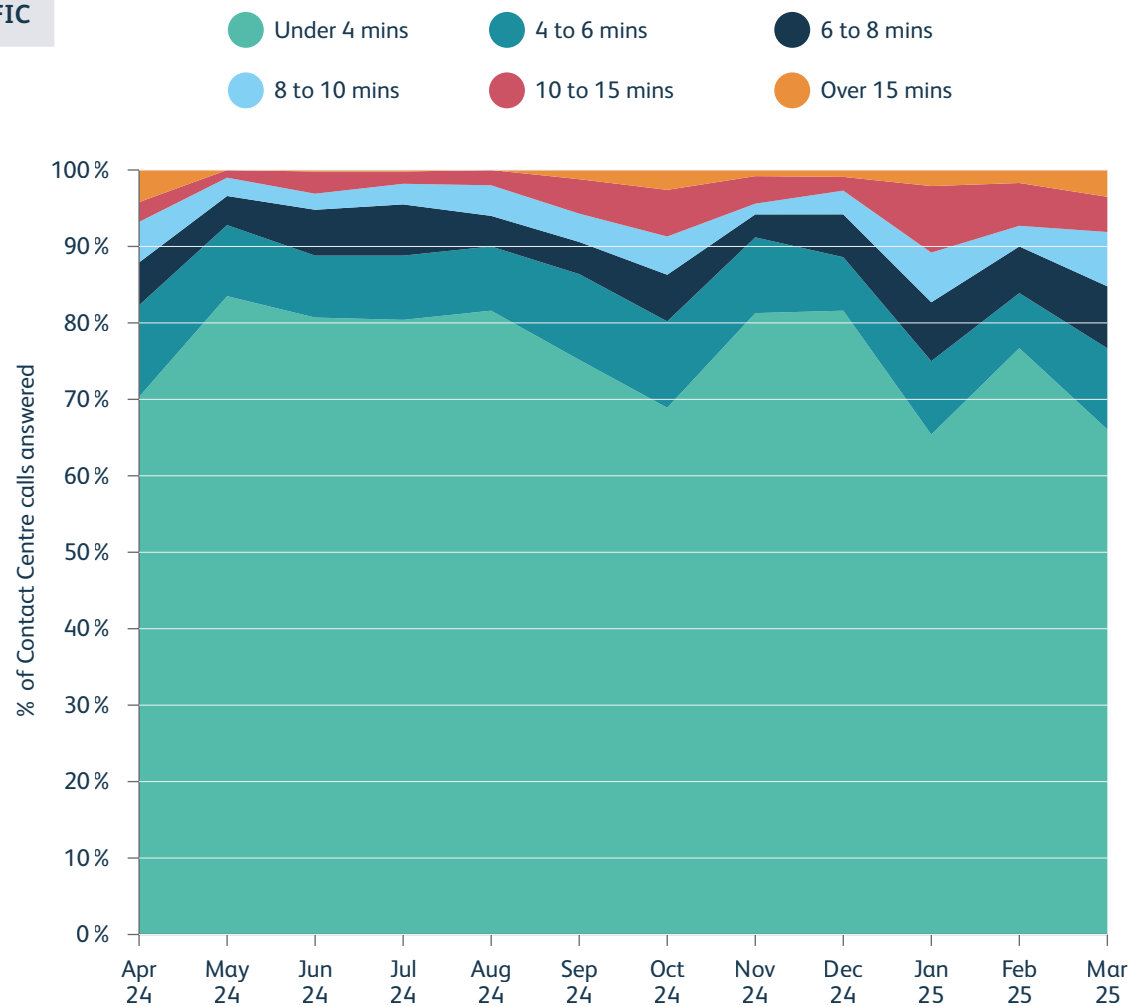
# CONTACT CENTRE CALLS PERFORMANCE



## WAIT TIME RANGE

CLIENT SPECIFIC

	Under 4 mins	4 to 6 mins	6 to 8 mins	8 to 10 mins	10 to 15 mins	Over 15 mins
Apr 24	70.4%	12.0%	5.6%	5.3%	2.6%	4.2%
May 24	83.5%	9.3%	3.8%	2.4%	1.0%	0.0%
Jun 24	80.7%	8.1%	6.0%	2.1%	2.9%	0.2%
Jul 24	80.4%	8.4%	6.7%	2.7%	1.6%	0.2%
Aug 24	81.6%	8.4%	4.0%	4.0%	2.0%	0.0%
Sep 24	75.1%	11.2%	4.2%	3.7%	4.5%	1.2%
Oct 24	68.9%	11.3%	6.1%	5.0%	6.1%	2.6%
Nov 24	81.2%	9.9%	3.0%	1.4%	3.6%	0.8%
Dec 24	81.6%	7.0%	5.6%	3.1%	1.8%	0.9%
Jan 25	65.4%	9.6%	7.7%	6.5%	8.7%	2.1%
Feb 25	76.7%	7.2%	6.1%	2.7%	5.6%	1.7%
Mar 25	66.0%	10.6%	8.1%	7.1%	4.6%	3.5%





# CONTACT CENTRE CALLS PERFORMANCE

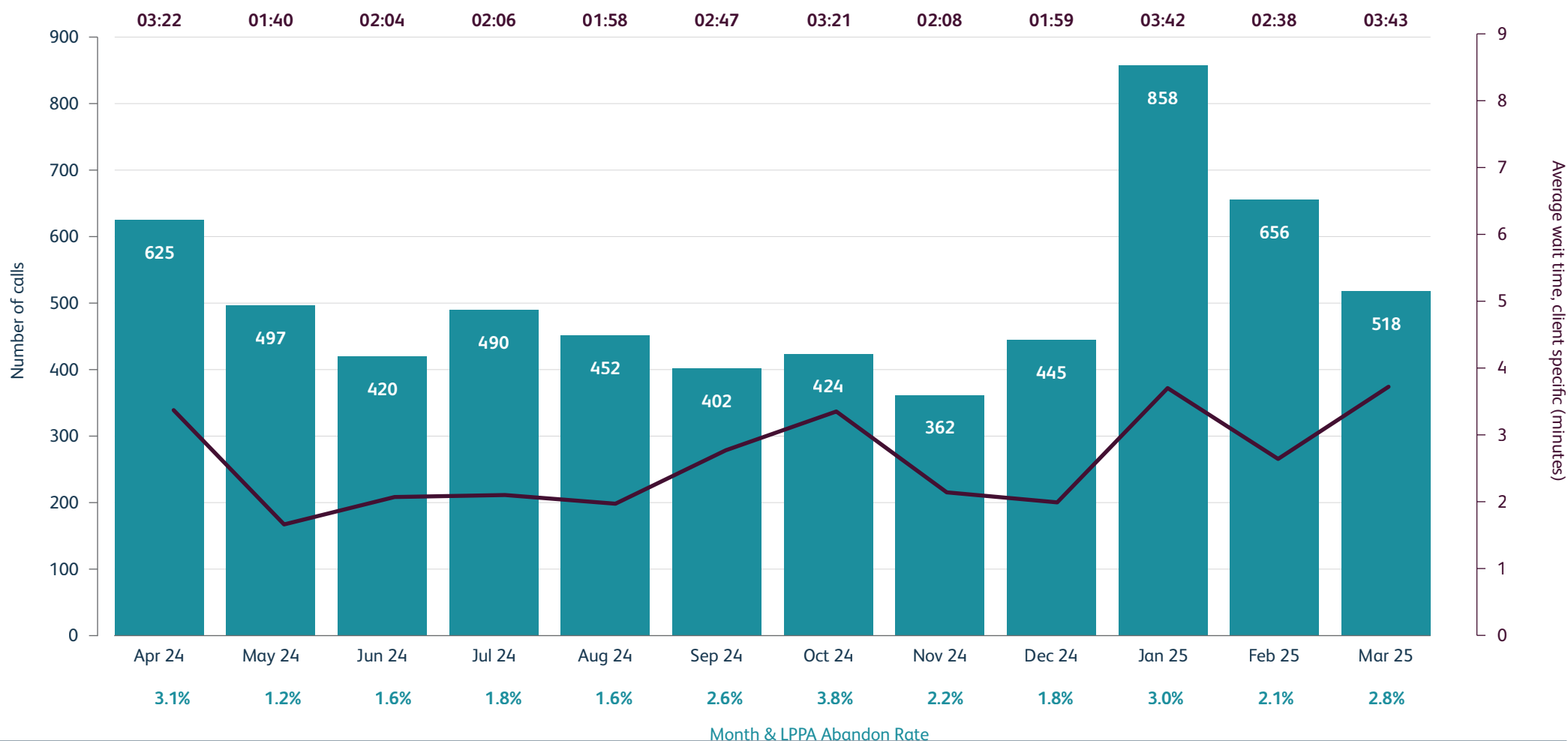


## CALLS ANSWERED

CLIENT SPECIFIC

— Average wait time (mm:ss)

Quarterly average wait time was 3 minutes 22 seconds



# Customer Satisfaction Scores

## In this section...

- Contact Centre calls satisfaction
- Contact Centre calls satisfaction - Agent
- Retirements - Active
- Retirements - Deferred

# CUSTOMER SATISFACTION SCORES

## Please note:

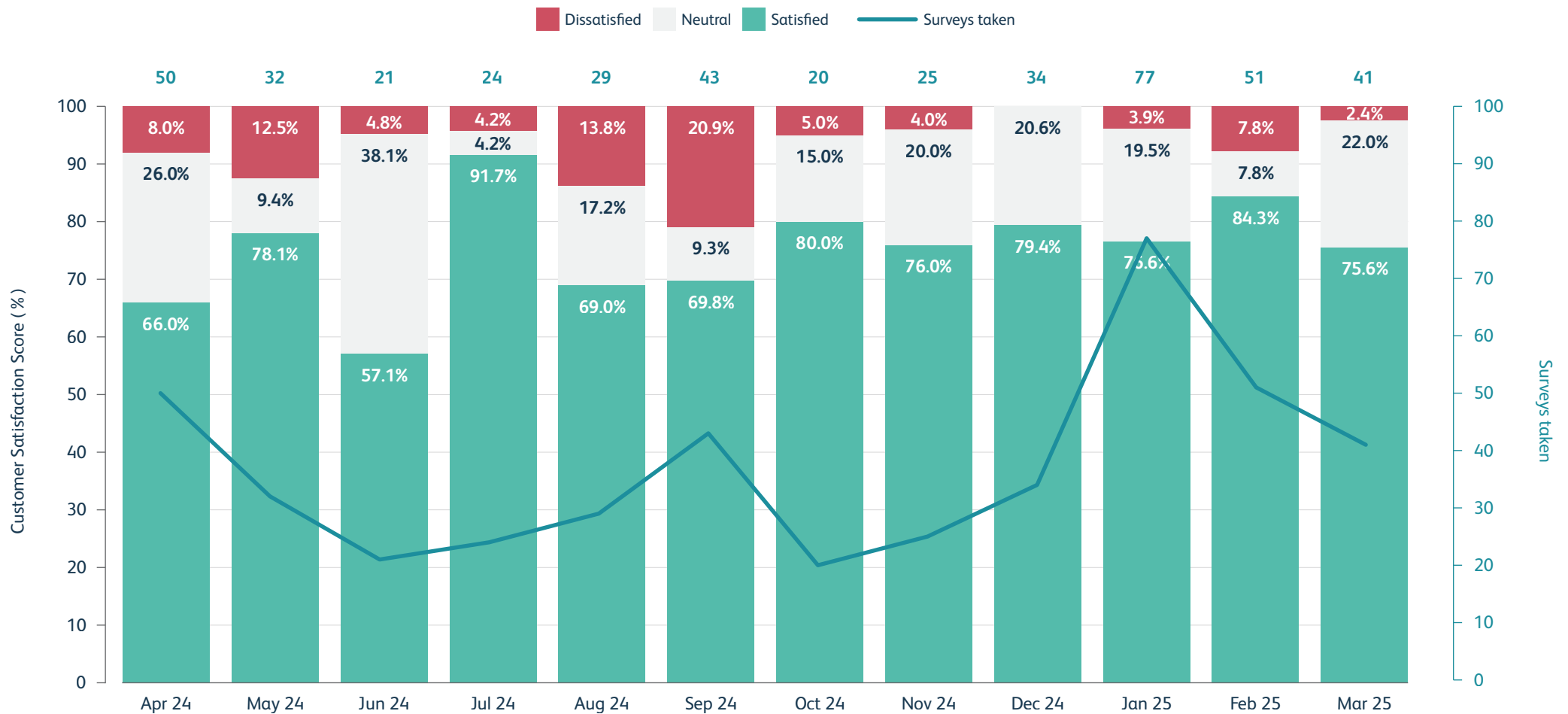
The graph measures monthly member satisfaction with LPPA ("How satisfied are you with the overall service you have received from LPPA?").



## CONTACT CENTRE CALLS SATISFACTION - OVERALL

## CLIENT SPECIFIC

Overall member satisfaction for the quarter was 78.7 %



# CUSTOMER SATISFACTION SCORES

## Please note:

The graph measures monthly member satisfaction with the Contact Centre adviser ("In connection with the adviser you have just spoken to, how satisfied are you with the service they provided?")



## CONTACT CENTRE CALLS SATISFACTION - AGENT

CLIENT SPECIFIC

Agent specific member satisfaction for the quarter was 92.6 %



# CUSTOMER SATISFACTION SCORES

## Please note:

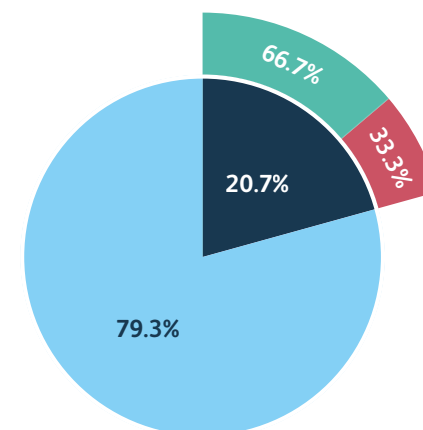
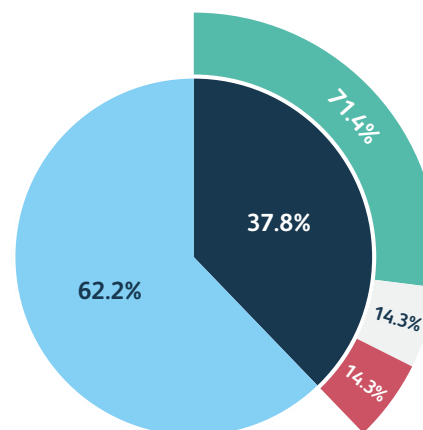
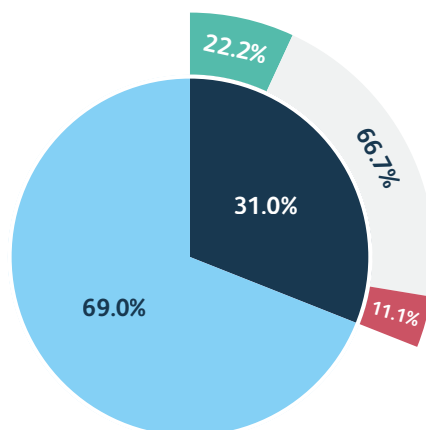
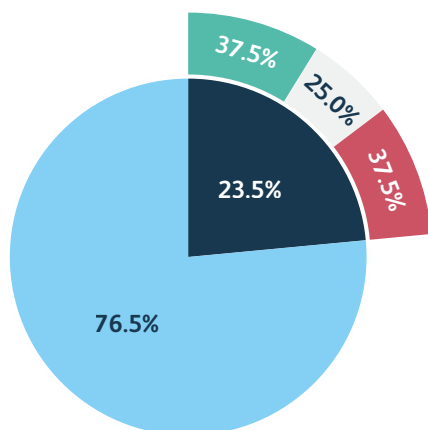
Graphs show a breakdown of quarterly retirement surveys:

- Retirements processed / completed (members can have multiple process counts)
- Surveys issued (does not equal retirement processes as not all members provide an email address; members with multiple retirement processes only receive one survey email; ill health retirements do not receive a survey email; there is a planned delay in issuing surveys to allow for initial payments to be paid). We extended this period in Q4, which explains the drop in the number of email surveys issued.
- The satisfaction scores highlighted in green and red compare the satisfied / dissatisfied responses received, as a % of total responses (the true measure of member satisfaction).\*



## RETIREMENTS - ACTIVE

### CLIENT SPECIFIC



Retirements processed, completed	45	
Surveys issued and as a % of retirements	34	75.6%
Satisfied Responses (as a % of surveys issued)	3	8.8%
Dissatisfied Response (as a % of surveys issued)	3	8.8%
Non responses and as a % of surveys issued	26	76.5%
Responses and as a % of surveys issued	8	23.5%
Satisfied responses and as a % of responses	3	37.5%
Neutral responses and as a % of responses	2	25.0%
Dissatisfied Responses and as a % of responses	3	37.5%

Q1 24/25		
Retirements processed, completed	45	
Surveys issued and as a % of retirements	34	75.6%
Satisfied Responses (as a % of surveys issued)	3	8.8%
Dissatisfied Response (as a % of surveys issued)	3	8.8%
Non responses and as a % of surveys issued	26	76.5%
Responses and as a % of surveys issued	8	23.5%
Satisfied responses and as a % of responses	3	37.5%
Neutral responses and as a % of responses	2	25.0%
Dissatisfied Responses and as a % of responses	3	37.5%

Q2 24/25		
Retirements processed, completed	31	
Surveys issued and as a % of retirements	29	93.5%
Satisfied Responses (as a % of surveys issued)	2	6.9%
Dissatisfied Response (as a % of surveys issued)	1	3.4%
Non responses and as a % of surveys issued	20	69.0%
Responses and as a % of surveys issued	9	31.0%
Satisfied responses and as a % of responses	2	22.2%
Neutral responses and as a % of responses	6	66.7%
Dissatisfied Responses and as a % of responses	1	11.1%

Q3 24/25		
Retirements processed, completed	45	
Surveys issued and as a % of retirements	37	82.2%
Satisfied Responses (as a % of surveys issued)	10	27.0%
Dissatisfied Response (as a % of surveys issued)	2	5.4%
Non responses and as a % of surveys issued	23	62.2%
Responses and as a % of surveys issued	14	37.8%
Satisfied responses and as a % of responses	10	71.4%
Neutral responses and as a % of responses	2	14.3%
Dissatisfied Responses and as a % of responses	2	14.3%

Q4 24/25		
Retirements processed, completed	29	
Surveys issued and as a % of retirements	29	100.0%
Satisfied Responses (as a % of surveys issued)	4	13.8%
Dissatisfied Response (as a % of surveys issued)	2	6.9%
Non responses and as a % of surveys issued	23	79.3%
Responses and as a % of surveys issued	6	20.7%
Satisfied responses and as a % of responses	4	66.7%
Neutral responses and as a % of responses	0	0.0%
Dissatisfied Responses and as a % of responses	2	33.3%

\*More information on data / results are included in the Definitions page earlier in this report.

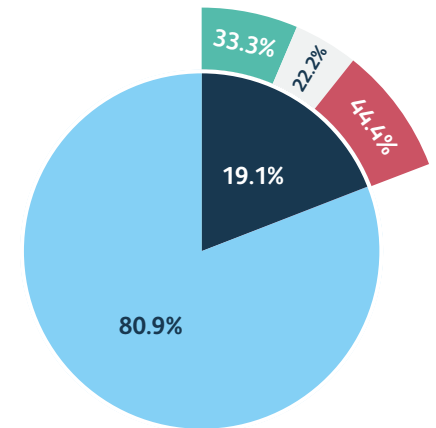
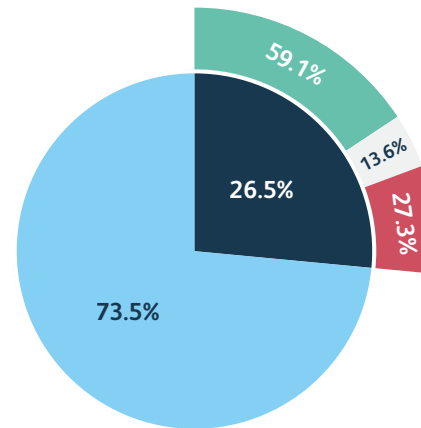
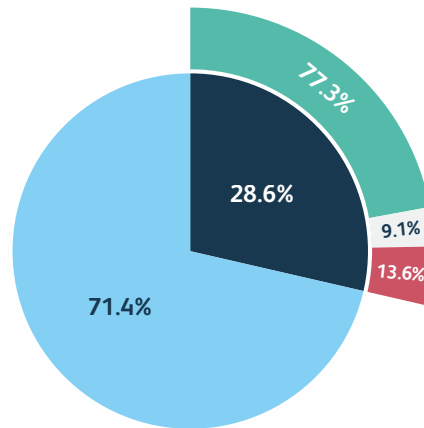
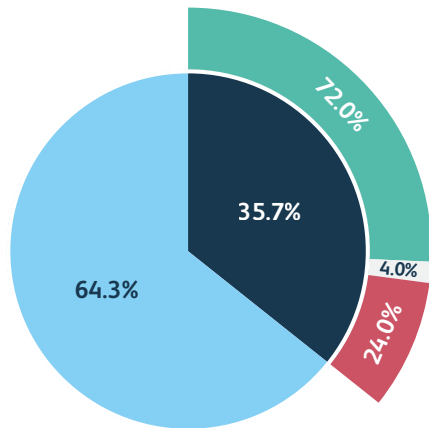
# CUSTOMER SATISFACTION SCORES



## RETIREMENTS - DEFERRED

CLIENT SPECIFIC

- Satisfied
- Neutral
- Dissatisfied
- Responses
- Non responses



Retirements processed, completed
Surveys issued and as a % of retirements
Satisfied Responses (as a % of surveys issued)
Dissatisfied Response (as a % of surveys issued)
Non responses and as a % of surveys issued
Responses and as a % of surveys issued
Satisfied responses and as a % of responses
Neutral responses and as a % of responses
Dissatisfied Responses and as a % of responses

Q1 24/25	
112	
70	62.5%
18	25.7%
6	8.6%
45	64.3%
25	35.7%
18	72.0%
1	4.0%
6	24.0%

Q2 24/25	
91	
77	84.6%
17	22.1%
3	3.9%
55	71.4%
22	28.6%
17	77.3%
2	9.1%
3	13.6%

Q3 24/25	
106	
83	78.3%
13	15.7%
6	7.2%
61	73.5%
22	26.5%
13	59.1%
3	13.6%
6	27.3%

Q4 24/25	
65	
47	72.3%
3	6.4%
4	8.5%
38	80.9%
9	19.1%
3	33.3%
2	22.2%
4	44.4%





# Member Online Portal

In this section...

- Total members registered

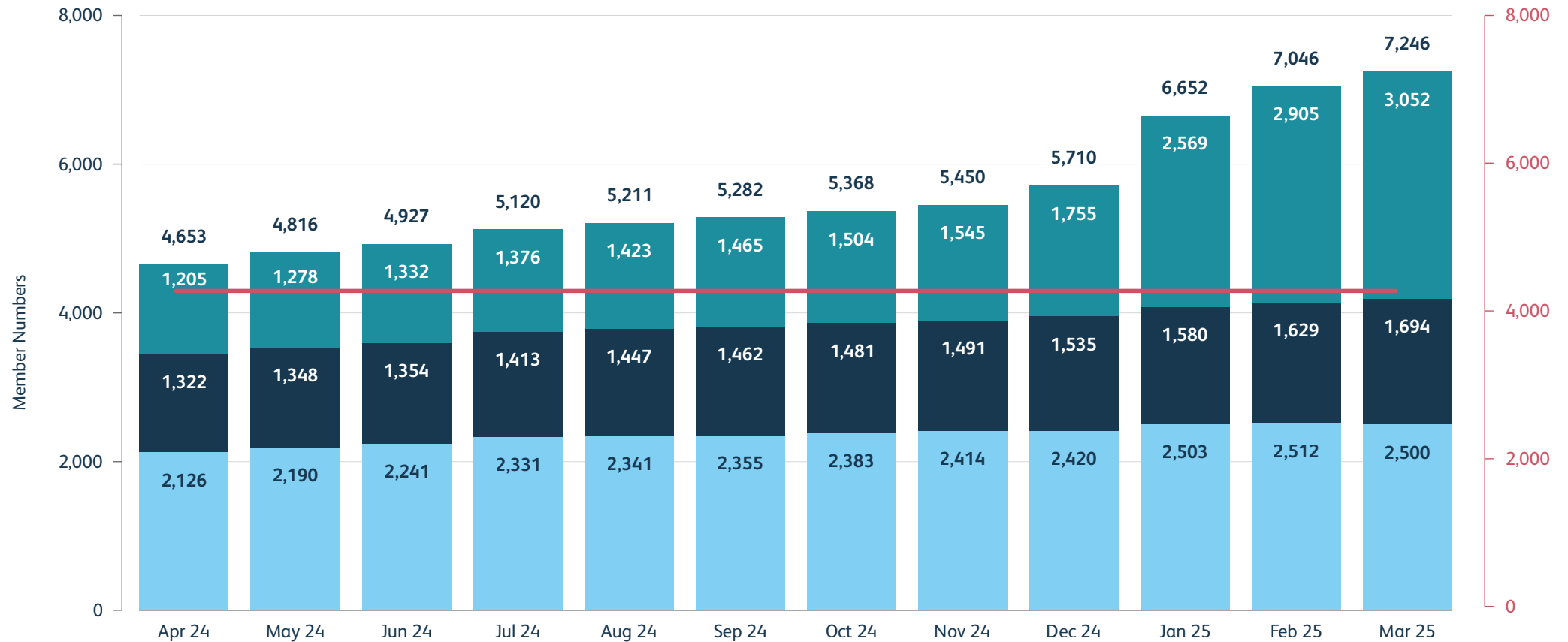


## TOTAL MEMBERS REGISTERED

CLIENT SPECIFIC

Active Deferred Pensioner

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



# Employer Engagement & Member Communication Activity

## In this section...

- Delivered
- Scheduled
- Engagement communications (employers & members)

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## DELIVERED

ALL LPPA

- Member training sessions were delivered, including Making Sense of Your (LGPS) Pension (to support new joiners in understanding their LGPS pension), and Making Sense of Your Retirement (to prepare members in their plans for retirement).
- Training sessions were successfully delivered to support employers including:
  - Monthly Returns (successfully submitting files and resolving data queries)
  - LGPS Scheme Essentials (including support with calculating final pay, CARE pay and assumed pensionable pay)
  - Employer Responsibilities (support with ongoing pension administration responsibilities)
  - Absence and Ill Health (support with managing different types of absence in the LGPS)
- Emails were issued to all LGPS employers (“Help Us to Improve the Retirement Process for your Employees”) to help communicate the leaver process, and the impact that timeliness accuracy of data submission can have on the member experience:
  - a. Leaver forms should be submitted to LPPA at least 30 days before a member’s retirement date.
  - b. Estimated final pay figures can be include in the leaver form, in the absence of confirmed final pay)
  - c. Details of which ‘Reasons for Leaving’ still require a leaver form to be submitted (and for other reasons, that they can be included as part of the monthly data return).
- Further Monthly Return reminders were issued, including details of the 2025 valuation (the importance of accurate and up-to-date data files, and the possible impact on employer contributions of non-submission)

- Information on the McCloud Remedy was updated on the LPPA website for LGPS members.
- The LPPA website was updated in Q4 to include self-serve information on:
  - a. Transferring in / out of the LGPS
  - b. Contribution refunds
  - c. 2025 LGPS valuation (for employers)
  - d. Understanding your Benefits
  - e. Notifying LPPA of a bereavement
  - f. Retirements (updates to AVC information)
  - g. Pension Increases and CARE revaluation.
- Pension Pulse (employer newsletter) was issued in Q4 with features on:
  - a. LGPS valuation 2025
  - b. Monthly returns and Annual Benefit Statements (2024/25)
  - c. Ongoing updates on the latest employer training, monthly submission deadlines and retirement leaver notifications (submission at least 30 days in advance of the retirement date)



## EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



### SCHEDULED

ALL LPPA

- The annual, online newsletter will be published on the LPPA website, and emails issued to retired members of the LGPS. The newsletter will focus on accessing 2024/25 P60 documents, pension pay dates for 2025/26 and information on the McCloud remedy.
- Further Pension Pulse (employer newsletter) communications will be issued in Q1 with a focus on the 'employer toolkit', and resources that can be used to increase active member engagement with their LGPS pension.
- Work will continue at pace to ensure that communications are issued to LGPS members impacted by McCloud remedy, ahead of the statutory deadline (31 August 2025)
- Further improvements will be made to the LPPA pensions website.



# Data Quality

## In this section...

- TPR data scores
- Common data
- Scheme specific data

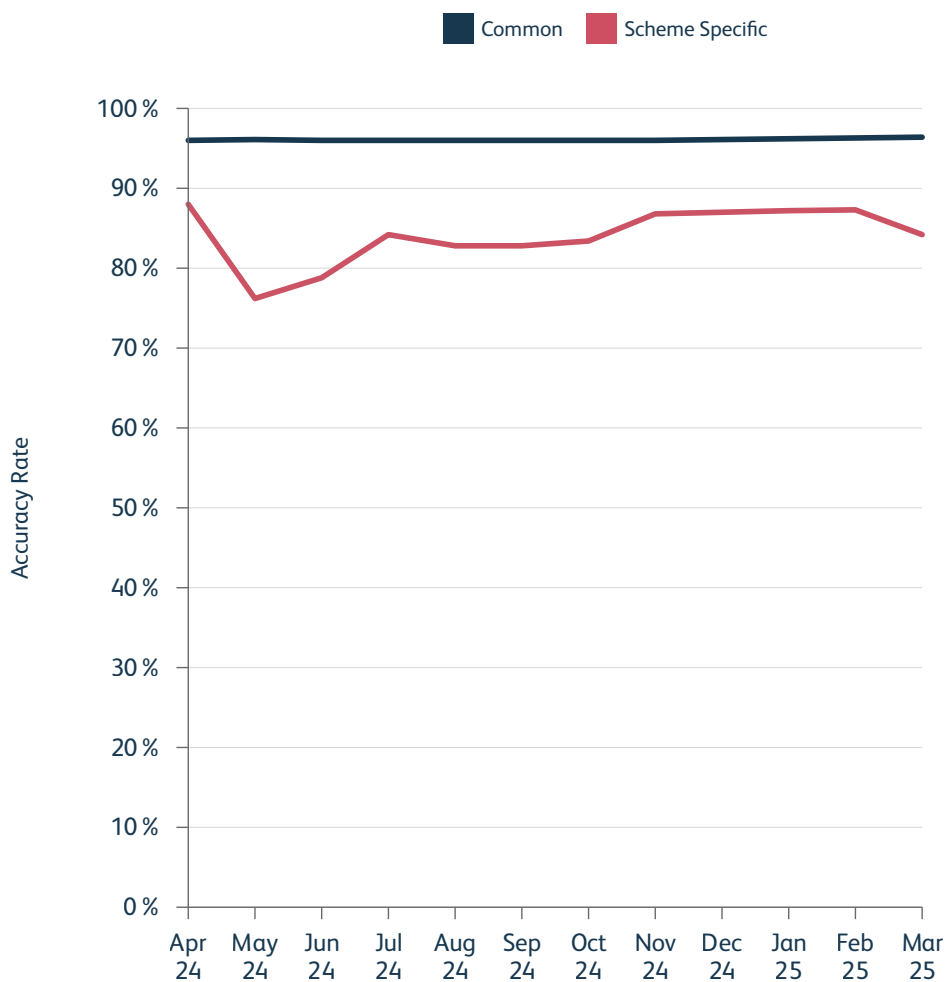


# DATA QUALITY



## TPR DATA SCORES

CLIENT SPECIFIC



### Please note:

Fall in Q1 Scheme Specific Data score is seasonal, and specifically related to the processing of Pensions Increase for deferred members and Annual Allowance calculations (which follow employer submission of data returns and ABS processing).

	Common (Target 95 %)	Scheme Specific (Target 90 %)
Apr 24	96.0%	88.0%
May 24	96.1%	76.2%
Jun 24	96.0%	78.8%
Jul 24	96.0%	84.2%
Aug 24	96.0%	82.8%
Sep 24	96.0%	82.8%
Oct 24	96.0%	83.4%
Nov 24	96.0%	86.8%
Dec 24	96.1%	87.0%
Jan 25	96.2%	87.2%
Feb 25	96.3%	87.3%
Mar 25	96.4%	84.2%

# END OF QUARTER DATA QUALITY

(TPR SCORES)



## COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	2	78	22
Duplicate effective date in status history	1	4	1
Gender is not Male or Female	23	1	0
Duplicate entries in status history	23	33	21
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	9	1	4
Missing Surname	0	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	9	0	0
No entry in the status history	1	0	11
Last entry in status history does not match current status	21	6	8
Member has no address	77	519	18
Missing Forename(s)	0	6	0
Missing State Retirement Date	23	1	5
Missing postcode	71	557	34
Missing Date Joined Pensionable Service	0	0	11
<b>Total Fails</b>	<b>260</b>	<b>1,206</b>	<b>135</b>
<b>Individual Fails</b>	<b>144</b>	<b>660</b>	<b>94.0</b>
<b>Total Members</b>	<b>6,730</b>	<b>10,260</b>	<b>7,685</b>
<b>Accuracy Rate</b>	<b>97.9%</b>	<b>93.6%</b>	<b>98.8%</b>
<b>Total Accuracy Rate</b>	<b>96.4%</b>		



## SCHEME SPECIFIC DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	102
AVCs/Additional Contributions	19
Deferred Benefits	3
Tranches (DB)	653
Gross Pension (Pensioners)	55
Tranches (Pensioners)	462
Gross Pension (Dependants)	89
Tranches (Dependants)	24
Date of Leaving	283
Date Joined Scheme	288
Employer Details	14
Salary	595
Crystallisation	147
CARE Data	233
CARE Revaluation	3
Annual Allowance	692
LTA Factors	198
Date Contracted Out	5
Pre-88 GMP	663
Post-88 GMP	587
<b>Total Fails</b>	<b>5,115</b>
<b>Individual Fails</b>	<b>3,887</b>
<b>Total Members</b>	<b>24,675</b>
<b>Accuracy Rate</b>	<b>84.2%</b>

# LPP

Local Pensions Partnership  
Administration