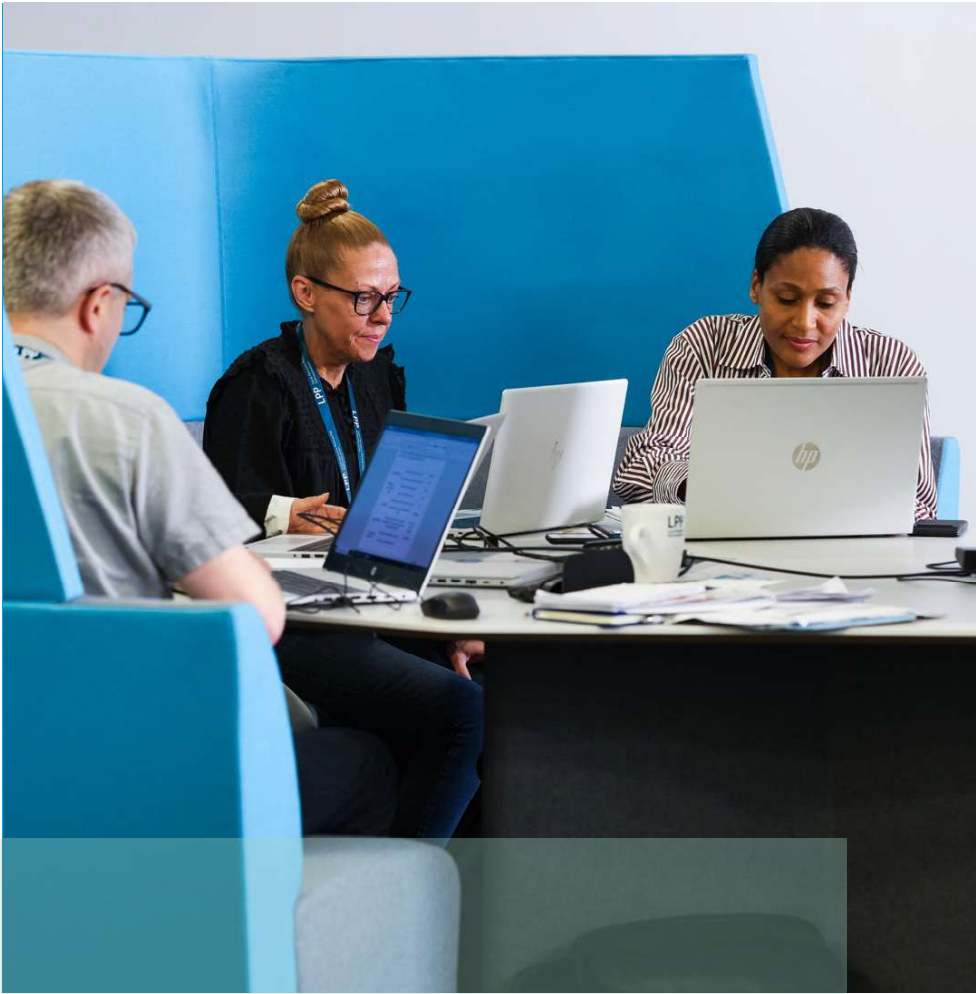




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Forward thinking
Working together
Doing the right thing
Committed to excellence



ANNUAL SUMMARY

LPPA has consistently delivered monthly casework performance against the 95 % target, and in line with contractual obligations.

Helpdesk and Retirement satisfaction scores are reported at client level to provide a more specific view of satisfaction scores for members. To improve the service provided to clients, employers and members, a key focus has been on delivering more functionality through the online self-service portals, and enabling more real time validation and automation across the casework processes that are integral to our administration responsibilities. This will remain a priority as we move forwards into 2026-27, to ensure that the quality of data and casework continues to improve, and that this is reflected in both the member and employer experience.

Helpdesk performance has remained steady during 2025-26, with average call wait times generally below the non-contractual 4-minute target.

McCloud has been a significant project in the year and will continue to be a key focus in 2026-27, as LPPA follows the national guidelines and timescales relating to the implementation of the remedy and the inclusion of Remedy underpin details on members' Annual Benefit Statements.

LPPA achieved a key milestone with successful connection to the Pensions Dashboard. Work continues on business readiness and it is estimated that members will be able to access by late summer 2027.

All regulatory and statutory deadlines in the year were successfully met.

Accreditation and awards

LPPA achieved re-certification for Cyber Essentials Plus and also passed our ISO 27001 re-certification audit. These accreditations show our commitment to cyber and information security and keeping members' data safe.

LPPA received our first AAF 01/20 Type 2 Report for the period 1 April 2024 to 31 March 2025 (a further Type 2 report for the period 2025 / 2026 is anticipated around the middle of the year). This is an excellent result which evidences that LPPA has robust controls in place around the services it provides.

In Q4 LPPA undertook the rigorous PASA accreditation (Pensions Administration Standards Association) assessment process and we were delighted to receive news that LPPA had been

awarded PASA accreditation from the 1 April 2026. The PASA accreditation represents the highest standards for UK pension administrators and is aligned to the Pension Regulators General Code.

LPPA won the award for Best Pension Scheme Communications Strategy at the 2025 Professional Pensions UK Pensions Awards. The award was presented for a series of campaigns delivered over the past 12 months, which helped to drive membership to the online PensionPoint portal.

LPPA won the Pension Administration Award (2 October) at the 2025 LAPF Investment Awards. The award acknowledged LPPA's operational service performance across the previous 12 months and recognised the positive impact of AI and automation within the business. Other nominees were Essex pension fund, Greater Manchester pension fund, NE Scotland pension fund, Surrey pension fund and West Yorkshire pension fund.



Casework Performance

In this section...

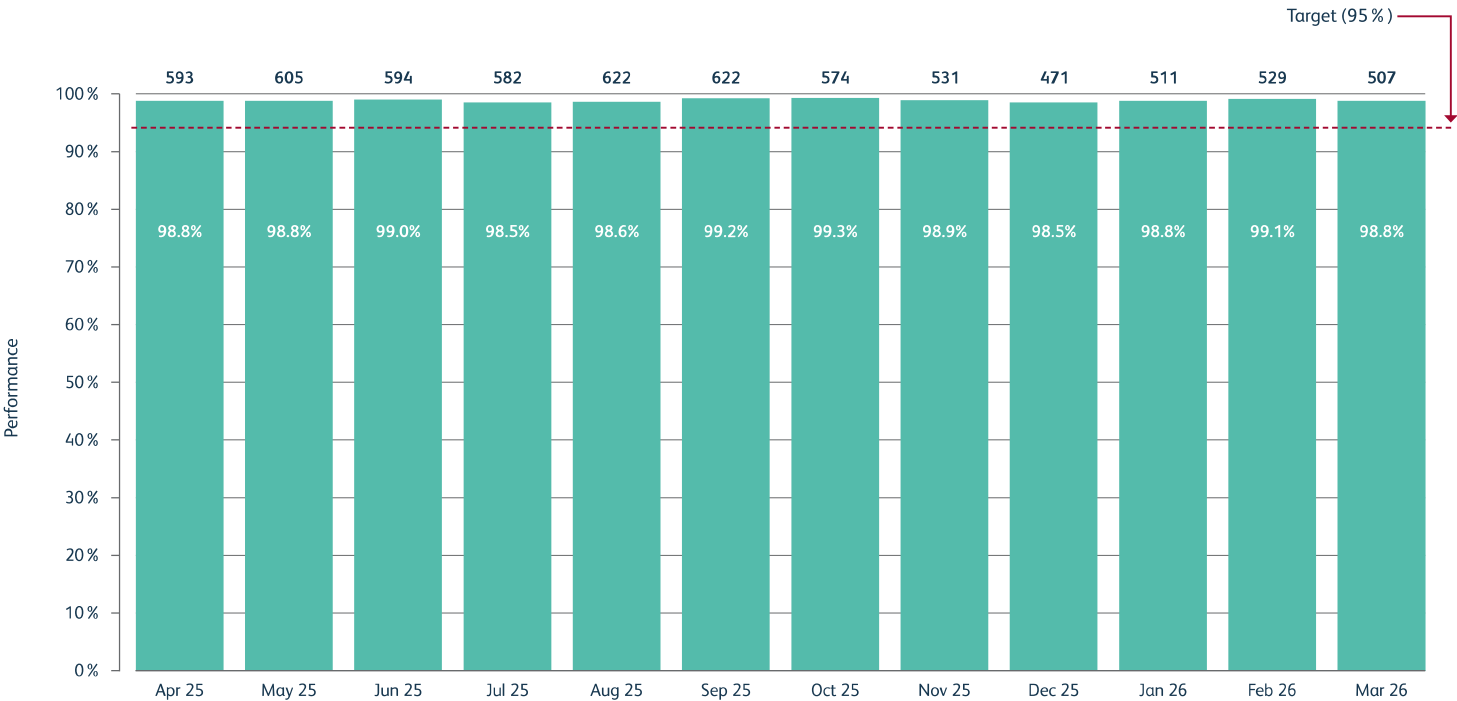
- Performance – all cases
- Performance standard
- Ongoing casework at the end of the reporting quarter

CASEWORK PERFORMANCE

Performance – All Cases

Client Specific

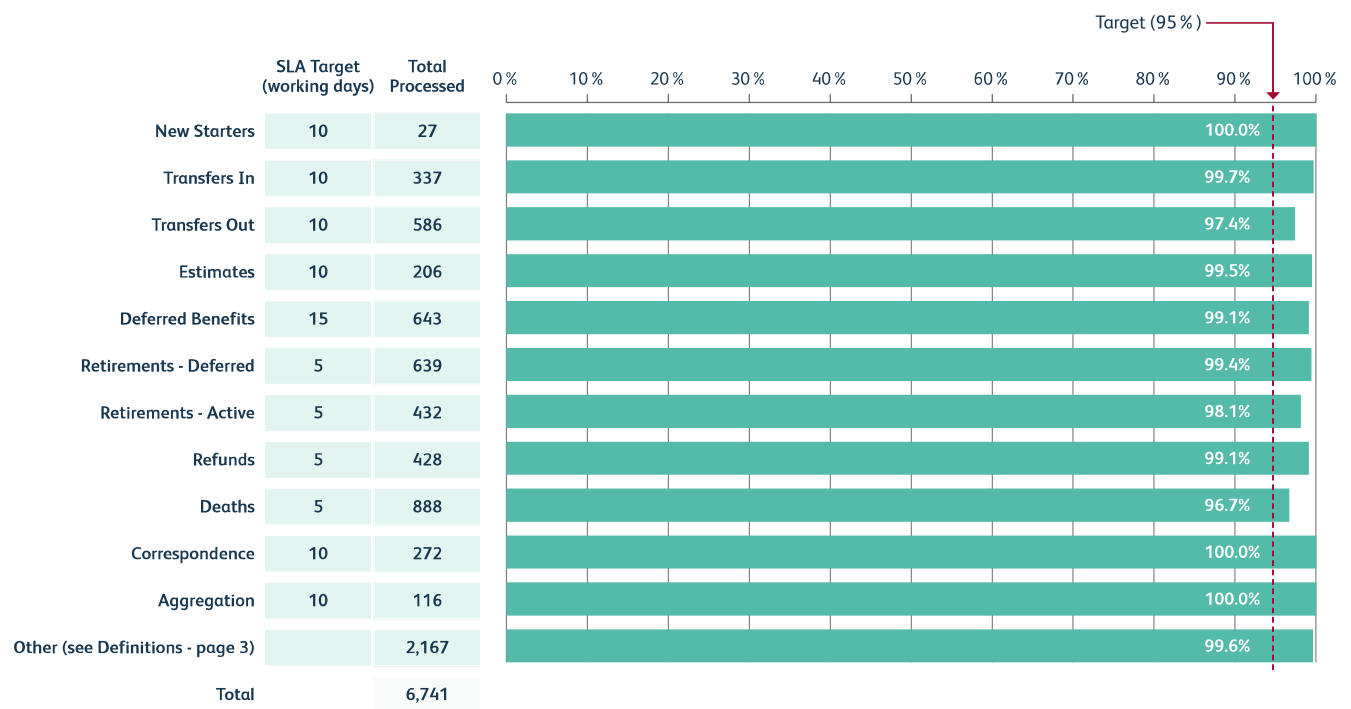
Total completed cases included for each month. The annual SLA performance was 98.9%.



CASEWORK PERFORMANCE

Performance Standard

Client Specific



CASEWORK PERFORMANCE

Ongoing Casework at the End of the Reporting Quarter

Client Specific

The following table is created by identifying all reportable casework within UPM, and includes those that have subsequently Completed / Aborted / Remain Outstanding within the quarter. The figures in this table cannot be compared to those in the previous slide for a number of reasons including: the table includes aborted cases, but the horizontal bar graph does not; the SLA 'stop trigger' can be actioned before the process has been completed.

	Brought forward at 01/04/25	Received (Inbound)	Completed (Outbound)	Outstanding as of 31/03/26
New Starters	7	40	47	0
Transfers In	246	572	472	346
Transfers Out	282	789	778	293
Estimates	16	225	231	10
Deferred Benefits	316	909	978	247
Retirements - Deferred	148	733	767	114
Retirements - Active	118	781	789	110
Refunds	90	682	683	89
Deaths	510	1,207	1,371	346
Correspondence	104	577	627	54
Aggregation	193	601	713	81
Other	66	2,241	2,250	57
Total	2,096	9,357	9,706	1,747

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...

- Calls answered

CONTACT CENTRE CALLS PERFORMANCE

 Calls Answered

Client Specific

Annual average wait time was 3 minutes 27 seconds.



Employer Engagement & Member Communication Activity

In this section...

- Delivered

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



Delivered

All LPPA

- Member training sessions were delivered throughout 2025/26, 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.
- LPPA supported employers with training sessions aimed at improving administration performance, and issued regular email newsletter communications (Pension Pulse).
- Statutory communications were issued to members throughout the year including:
 - The 2025 LPPA retiree's online newsletter was issued to members. This included updates on pension increases, 'understanding your P60' and pension pay dates.
 - The 2025 active and deferred online newsletter to members, communicating how they can access their 2025 ABS through PensionPoint, as well as information on CARE revaluation, and the age discrimination remedy (McCloud)
 - Annual Allowance and Pension Saving Statement communications were also issued to eligible members.
- LPPA won the award for Best Pension Scheme Communications Strategy at the 2025 Professional Pensions UK Pensions Awards. The award was presented for a series of campaigns delivered over the past 12 months, which helped to drive membership to the online PensionPoint portal. LPPA were also shortlisted for Third-Party Administrator of the Year.
- A 'Pension Awareness Week' email campaign was issued to members in September, promoting the benefits of registering for PensionPoint, which generated a significant number of new registrations.
- A 'key employer strategy' was launched with the aim of providing 1-1 support through meetings with large employers, and a focus on addressing pension administration challenges, to provide solutions that improve operational performance (for example, working with employers to submit timely and accurate retirement notifications).
- LPPA won the Pension Administration Award (2 October) at the 2025 LAPF Investment Awards. The award acknowledged LPPA's operational service performance across the previous 12 months and recognised the positive impact of AI and automation within the business. Other nominees were Essex pension fund, Greater Manchester pension fund, NE Scotland pension fund, Surrey pension fund and West Yorkshire pension fund.
- Several employer and member communication activities were undertaken alongside Get Online Week (w/c 20 October 2025), to promote the benefits of PensionPoint (our secure, online portal) and to encourage member to register and login. These activities included:
 1. Employer Toolkit communications – ready-made communications that employers can download to promote the benefits of PensionPoint (and other aspects of the pension scheme) for their members.
 2. Member email communications – to encourage members to register for PensionPoint.
 3. LPPA website communications – straightforward and accessible case studies to help promote the benefits and ease of access of PensionPoint.
- Pension Tracing Day (26 October 2026) also featured on the LPPA website, to encourage members to locate any missing pensions.
- Employer communications were issued to encourage feedback and comment on the Ministry of Housing, Communities and Local Government (MHCLG) consultation on proposed changes to the LGPS in England and Wales.
- A new employer Leaver Form was launched in December, to make the process easier when submitting leaver details, and an email was issued in advance to ensure employers were consulted.

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

 *Delivered Continued*

All LPPA

- LPPA was shortlisted in three categories of the UK Professional Pension Awards. These include:
 - Third Party Administrator of the Year
 - Pensions Communication of the Year
 - Best Pension Scheme Communications Strategy

The UK Pensions Awards event is on the 11 June 2026.

- LPPA were re-certified for [Cyber Essential Plus](#), a government-backed certification scheme that aims to recognise UK businesses that have protected themselves from common online threats. Communications were issued through our website and LinkedIn, to provide members with confidence that LPPA works hard to keep their personal data safe and secure.
- And in April 2026, LPPA were delighted to receive PASA (Pensions Administration Standards Association) accreditation, which represents the highest standards for UK pension administrators and is aligned to the Pension Regulators General Code. LPPA were formally presented with the accreditation certificate and trophy at the PASA annual conference in London on 29 April 2026.



LPP

Local Pensions Partnership
Administration