

DEFINITIONS

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.

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.

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).

Member Online Portal

The number and % of Members that are registered for the Member Online Portal, including a quarterly view.

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

✓ 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		✓										
P60s and Newsletter to Pensioners		✓										
Annual Benefit Statement and Newsletter to Active Members					✓							
Pension Saving Statements							✓					
HMRC Scheme Returns							✓					
IAS19 data				✓	✓				✓			

EXECUTIVE SUMMARY

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

This performance report covers the reporting period of Q3 2022/23 (October – December 2022)

The second phase of the PACE migration to move to our new pensions administration system is now complete.

Phase 1 clients (9 clients / c300,000 members) successfully migrated between January – March 2022. Phase 2 clients (9 clients / c300,000 members) successfully migrated between October – December 2022.

To help us manage this significant change programme, we agreed a period of temporary relaxed SLAs for all clients between March – May 2022 and then again between November– January 2023.

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 pro-actively 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 active
OTHER	New Starters • 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).

Statutory Deadlines

Pensions Savings Statements were successfully issued in October 2022.

Casework SLA Performance

Casework performance for the period was impacted by the final Phase 2 Pace migration, and this migration contained the largest number of clients in a single go live (5 clients). The spikes in work created by the migrations adversely impacts performance. Relaxed SLAs will apply through to the end of January 2023 to support Pace transition.

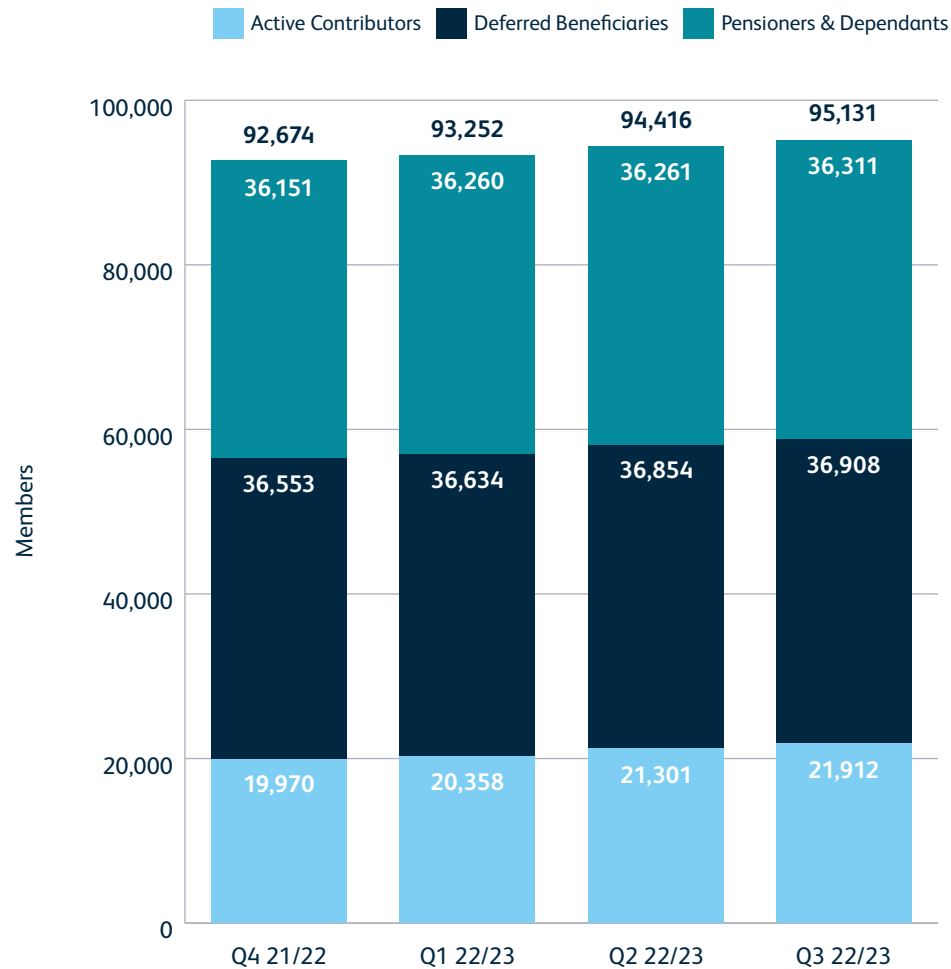
Fund Membership

In this section...

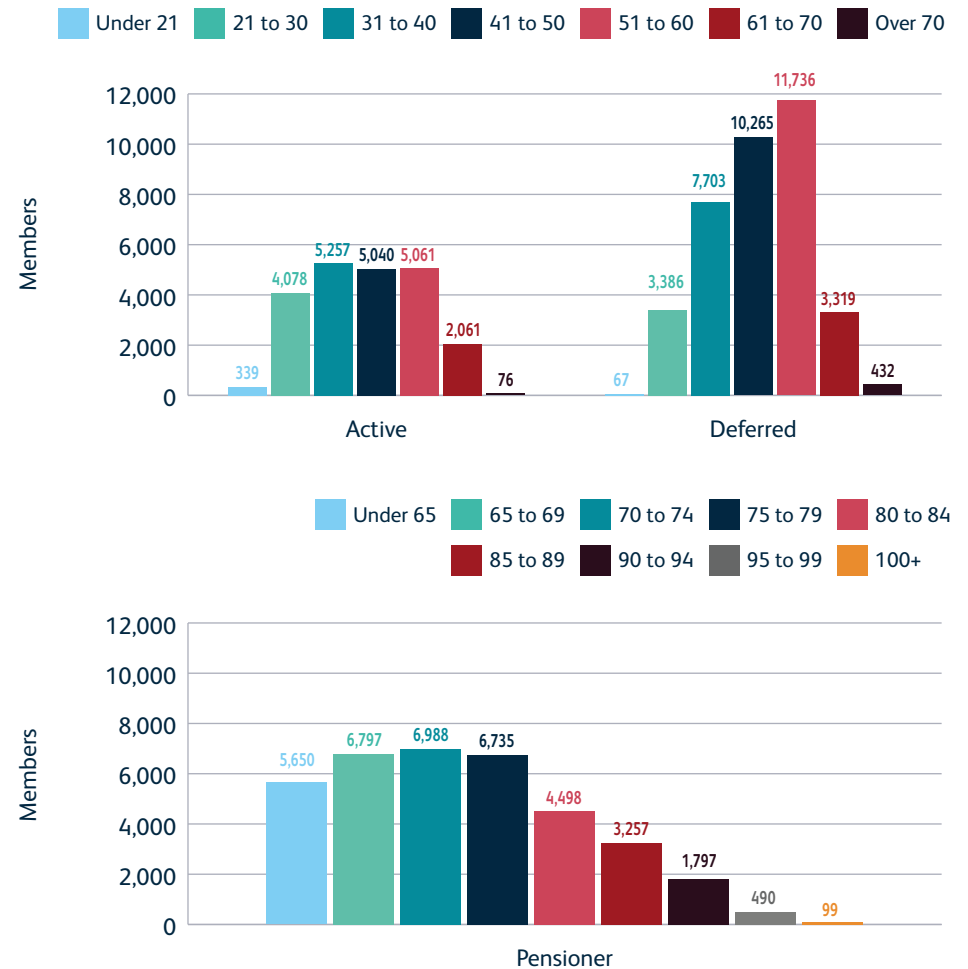
- Total Fund membership
- Current Age Demographic

TOTAL FUND MEMBERSHIP

TOTAL FUND MEMBERSHIP CLIENT SPECIFIC



CURRENT AGE DEMOGRAPHIC CLIENT SPECIFIC



Casework Performance Against SLA

In this section...

- Performance – All cases
- Performance Standard

CASEWORK PERFORMANCE AGAINST SLA

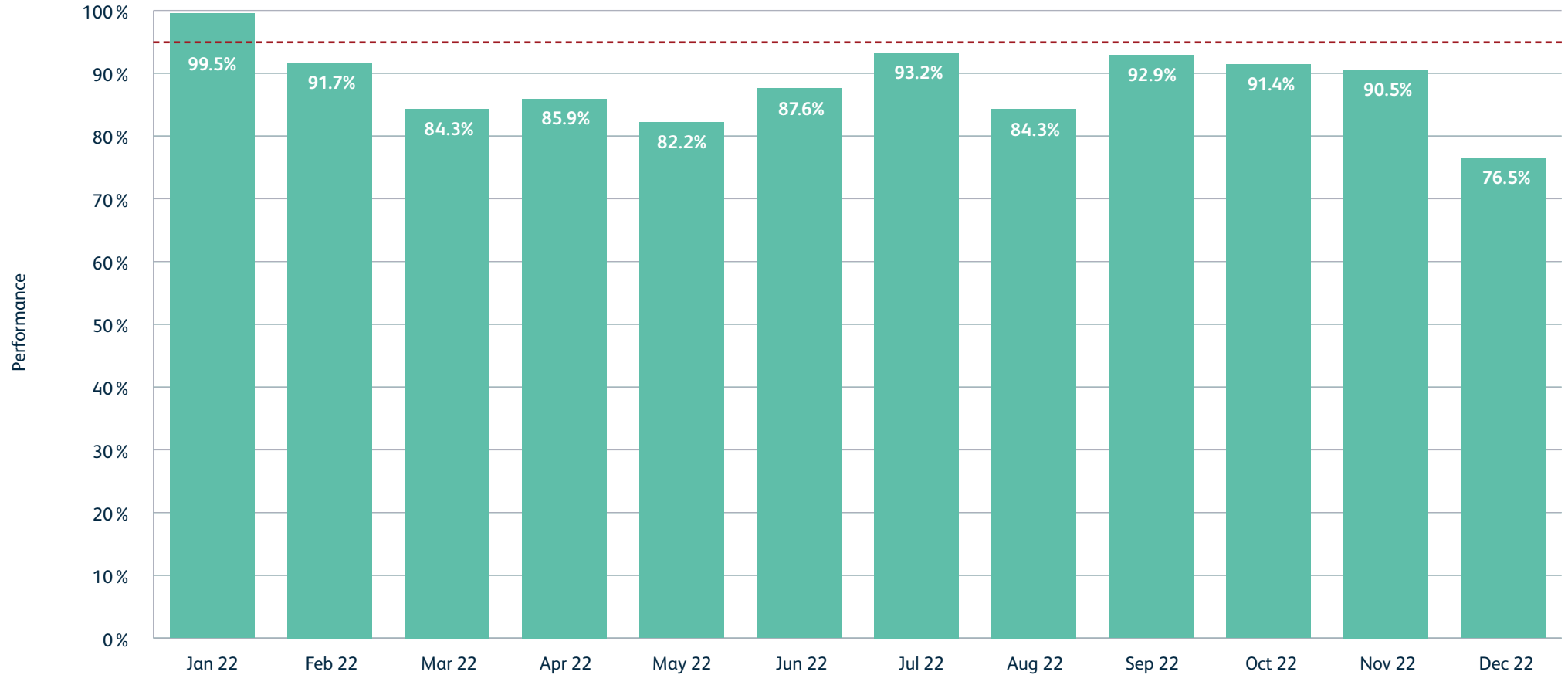


PERFORMANCE – ALL CASES

CLIENT SPECIFIC

--- Target (95 %)

The quarterly SLA performance was 87.4%

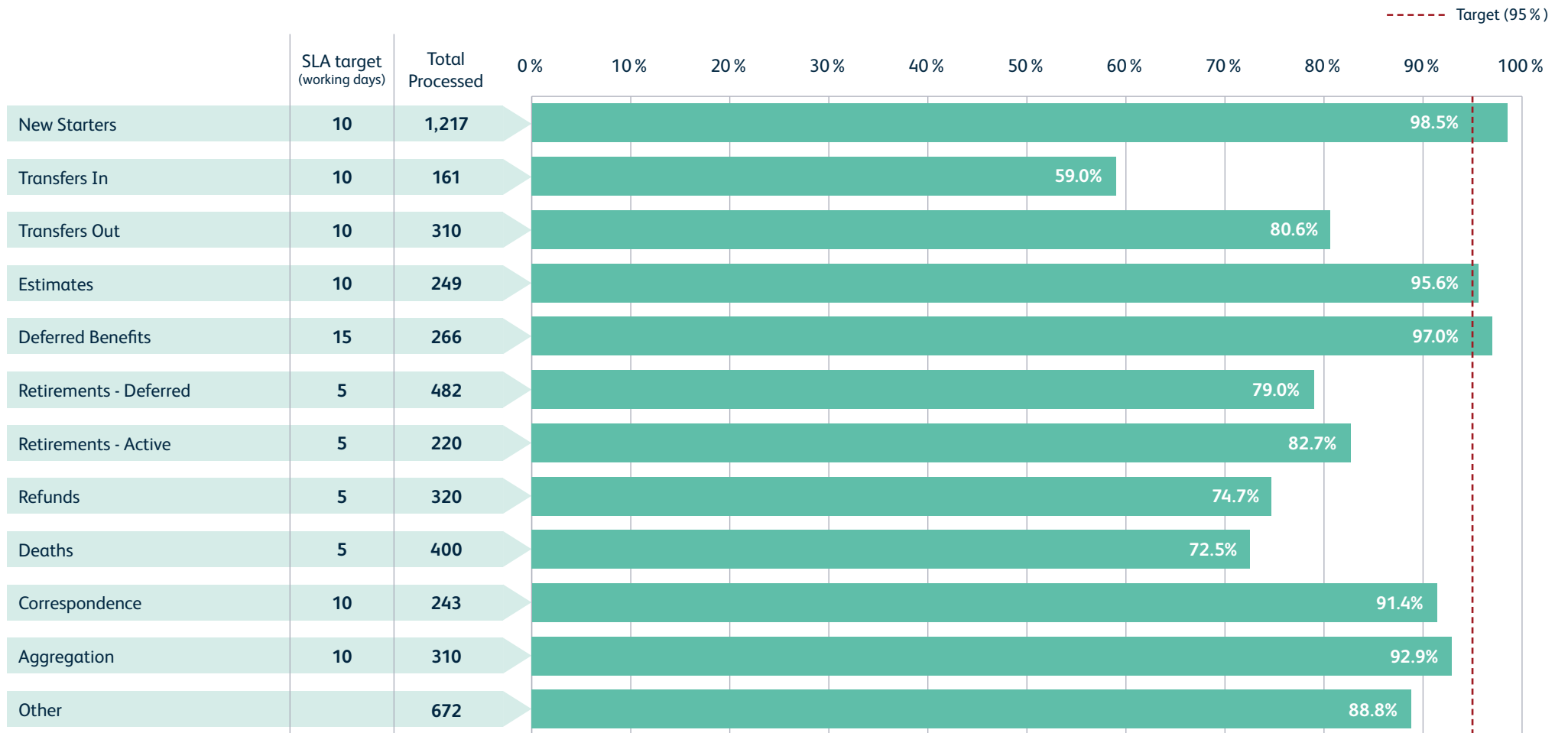


CASEWORK PERFORMANCE AGAINST SLA



PERFORMANCE STANDARD

CLIENT SPECIFIC





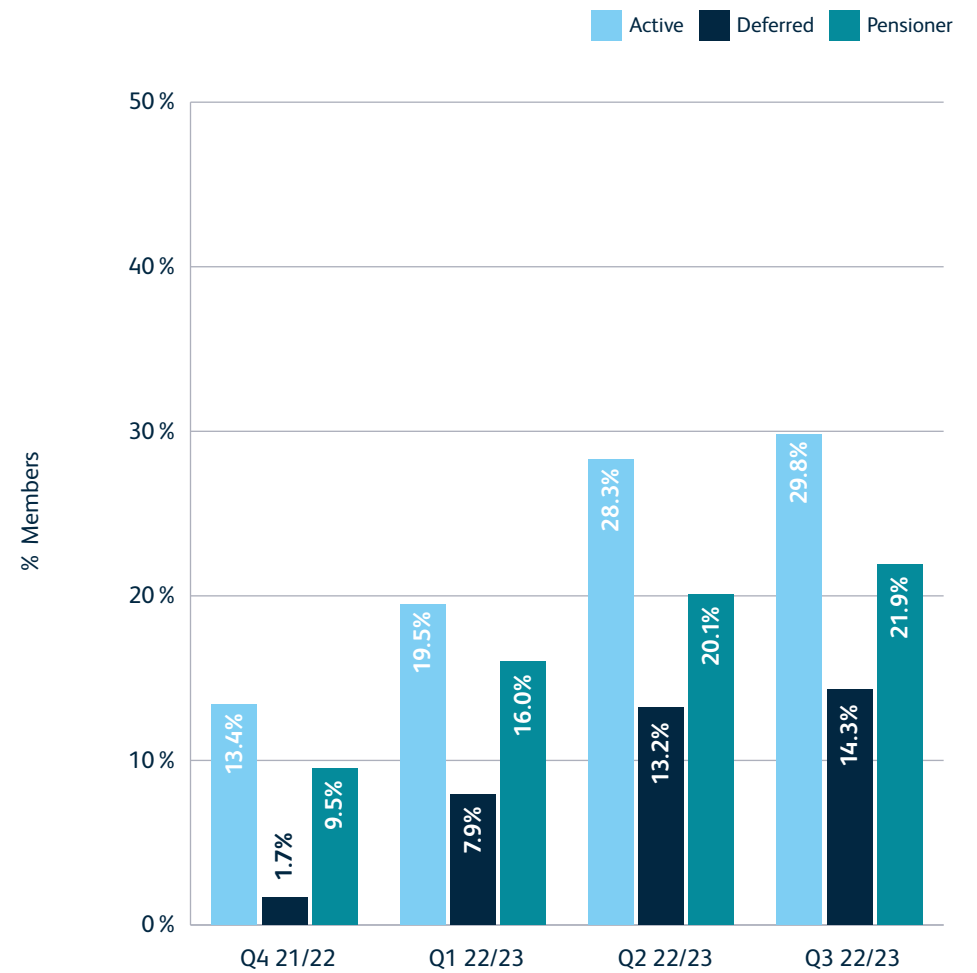
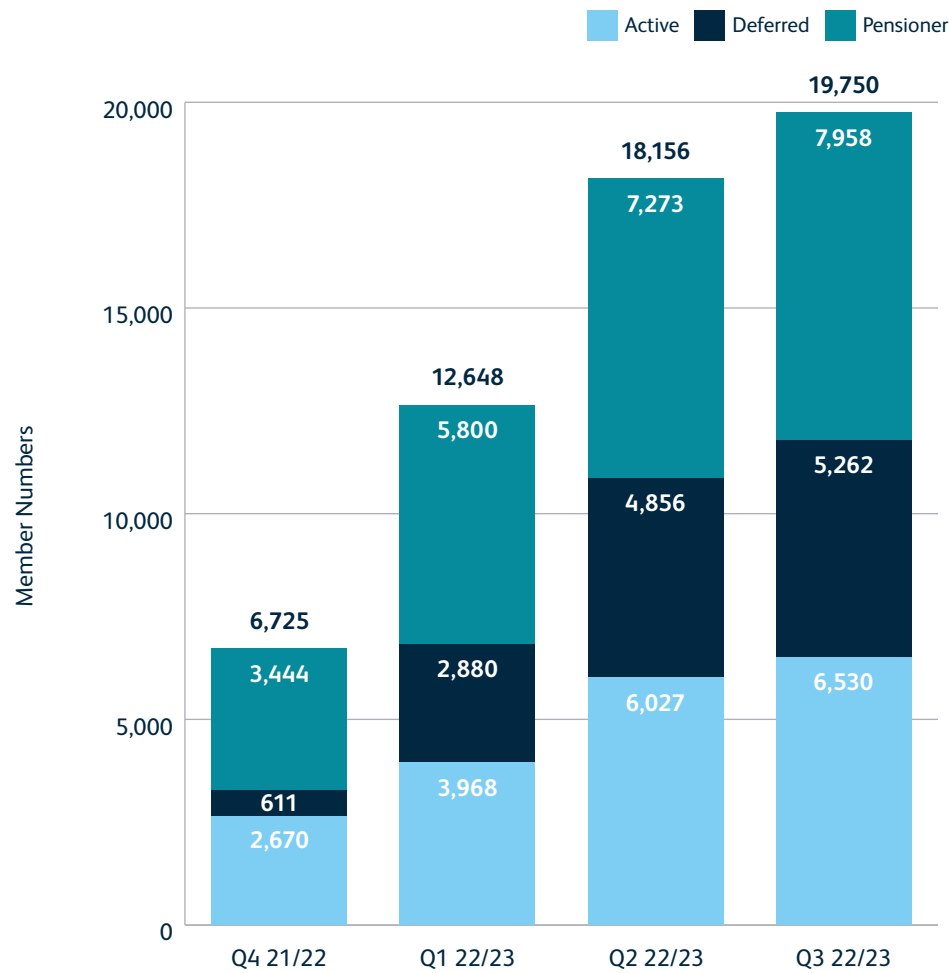
Member Online Portal

In this section...

- Members registered

MEMBERS REGISTERED

CLIENT SPECIFIC



EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- LPFA Employer Forum was held with 35 employers in attendance
- Virtual employer visits were held with 11 LPFA employers over 13 separate sessions
- 1 LPFA employer attended LGPS Scheme Essentials employer training
- Monthly returns training sessions were delivered with 14 employers attending across 2 sessions
- 1 LPFA employer attended PensionPoint awareness training
- Scheme leavers training was delivered with 4 employers attending across the 2 sessions
- UPM employer portal training was delivered with 5 employers attending across 4 sessions
- Monthly member sessions were delivered, with 22 LPFA Fund members attending the Making Sense of your Pension sessions and 6 attended Making Sense of your Retirement session
- Retirement planning sessions were delivered by LPPA to 15 members at London Fire Commissioner



EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



EMPLOYERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
13 Oct	London Legacy	LGPS Scheme Essentials Training	2
03 Nov	Sport England	UPM Employer Portal Training	1
14 Nov	LPPi	Employer Visit	1
14 Nov	Valuation Office Agency	Employer Visit	1
15 Nov	Capital City College Group	Monthly Returns Training	1
15 Nov	Lionheart	Monthly Returns Training	1
15 Nov	LSEC	Employer Visit	1
15 Nov	Roehampton University	Monthly Returns Training	1
15 Nov	South Thames College Group	Monthly Returns Training	1
15 Nov	Sport England	Monthly Returns Training	3
15 Nov	University of Westminster	Monthly Returns Training	3
16 Nov	LPFA Employers	Employer Forum	35
17 Nov	South Thames College Group	Scheme Leavers Training	2
17 Nov	England Institute of Sport	Scheme Leavers Training	1
17 Nov	University of Westminster	Scheme Leavers Training	1
18 Nov	University of the Arts London	Employer Visit	1
18 Nov	University of Westminster	Employer Visit	1
22 Nov	University of the Arts London	UPM Employer Portal Training	1
24 Nov	Brunel University	Employer Visit	1
25 Nov	London South East Colleges	Employer Visit	2
28 Nov	London South East Colleges	Employer Visit	4
02 Dec	Transport for London	Employer Visit	1
06 Dec	Lionheart	UPM Employer Portal Training	1
06 Dec	Compass Group	UPM Employer Portal Training	1
07 Dec	London Legacy Development Corporation	Employer Visit	5
08 Dec	Bishop Thomas Grant School	Monthly Returns Training	2
08 Dec	Food Standards Agency	Monthly Returns Training	1

Date	Employer	Activity	Number in attendance
08 Dec	Lee Valley Regional Park Authority	Monthly Returns Training	2
08 Dec	London Academy of Excellence	Monthly Returns Training	2
08 Dec	London Legacy Development Corporation	Monthly Returns Training	1
08 Dec	LPFA	Monthly Returns Training	1
08 Dec	Royal Borough of Greenwich	Monthly Returns Training	1
08 Dec	The horniman museum and gardens	Monthly Returns Training	1
08 Dec	University of Westminster	Monthly Returns Training	1
13 Dec	Brunel University	Scheme Leavers Training	1
14 Dec	Computacentre	PensionPoint Awareness Training	1
15 Dec	London South East Colleges	Employer Visit	1
15 Dec	Commission For Local Administration in England	UPM Employer Portal Training	1
16 Dec	London Met University	Employer Visit	1
22 Dec	LPFA	Employer Visit	1

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



MEMBERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
06 Oct	LPFA Members	Making sense of your pension	7
08 Nov	LPFA Members	Making sense of your pension	15
10 Nov	LPFA Members	Making sense of retirement	6
05 Dec	London Fire Commissioner	Pre-retirement	5

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



EMAILS – EMPLOYERS

CLIENT SPECIFIC

November

- Work Feed communications
- Planned maintenance days
- Planned maintenance days (update)
- Planned maintenance reminder
- November Pension Pulse
- Essential system maintenance reminder
- Monthly return (update)

December

- December opening hours
- Invite: book on monthly returns training

Data Quality

In this section...

- Common data
- Conditional data

DATA QUALITY (TPR SCORES)

COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	21	123	52
Duplicate effective date in status history	7	44	30
Gender is not Male or Female	0	0	0
Duplicate entries in status history	21	53	59
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	29	23	3
Missing Surname	0	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	13	0	0
No entry in the status history	6	1	0
Last entry in status history does not match current status	102	24	21
Member has no address	85	2,472	111
Missing Forename(s)	0	0	0
Missing State Retirement Date	0	0	0
Missing postcode	83	2,565	149
Missing Date Joined Pensionable Service	5	0	0
Total Fails	372	5,305	425
Individual Fails	262	2,754	277
Total Members	21,912	36,908	36,311
Accuracy Rate	98.8%	92.5%	99.2%
Total accuracy rate			96.5%

CONDITIONAL DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	249
AVC's/Additional Contributions	164
Deferred Benefits	26
Tranches (DB)	340
Gross Pension (Pensioners)	32
Tranches (Pensioners)	243
Gross Pension (Dependants)	11
Tranches (Dependants)	45
Date of Leaving	1,393
Date Joined Scheme	1,434
Employer Details	7
Salary	187
Crystallisation	1,361
Annual Allowance	1,925
LTA Factors	700
Date Contracted Out	452
Pre-88 GMP	1,462
Post-88 GMP	668
Total Fails	10,699
Individual Fails	8,099
Total Members	95,131
Accuracy Rate	91.5%