

DEFINITIONS

Page 6

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.

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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).

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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.



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 Q4 2022/23 (January – March 2023)

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

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 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 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

No statutory deadlines were due during the period.

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 applied through to the end of January to support Pace transition.

As outlined in previous quarterly performance reports, casework performance measures to the end of Q3 from UPM were not directly comparable with how they were measured from the previous system and were in excess of contractual obligations. Significant activity has taken place to ensure that we can measure performance in line with contractual obligations. The Q4 performance report is now measuring performance in line with contractual obligations.

EXECUTIVE SUMMARY CONTINUED

Satisfaction Scores

Helpdesk satisfaction scores has reduced slightly during the period. At the end of Q3, satisfaction was 80%, at the end of Q4 satisfaction was 78%.

Retirement satisfaction scores remained the same during the period. At the end of Q3, satisfaction was 64%, at the end of Q4 satisfaction was also 64%. Satisfaction scores have been impacted by the phase 2 migrations and spikes in work which we currently have plans in place to work through.

Pensions Helpdesk

Helpdesk performance for the period has seen average wait times remain slightly higher, average 9 minutes, than our non-contractual target of 4 minutes. In January the average wait peaked at 10 minutes as performance was adversely impacted by higher call volumes at the start of the month, driving up average wait times.

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



Fund Membership

In this section...

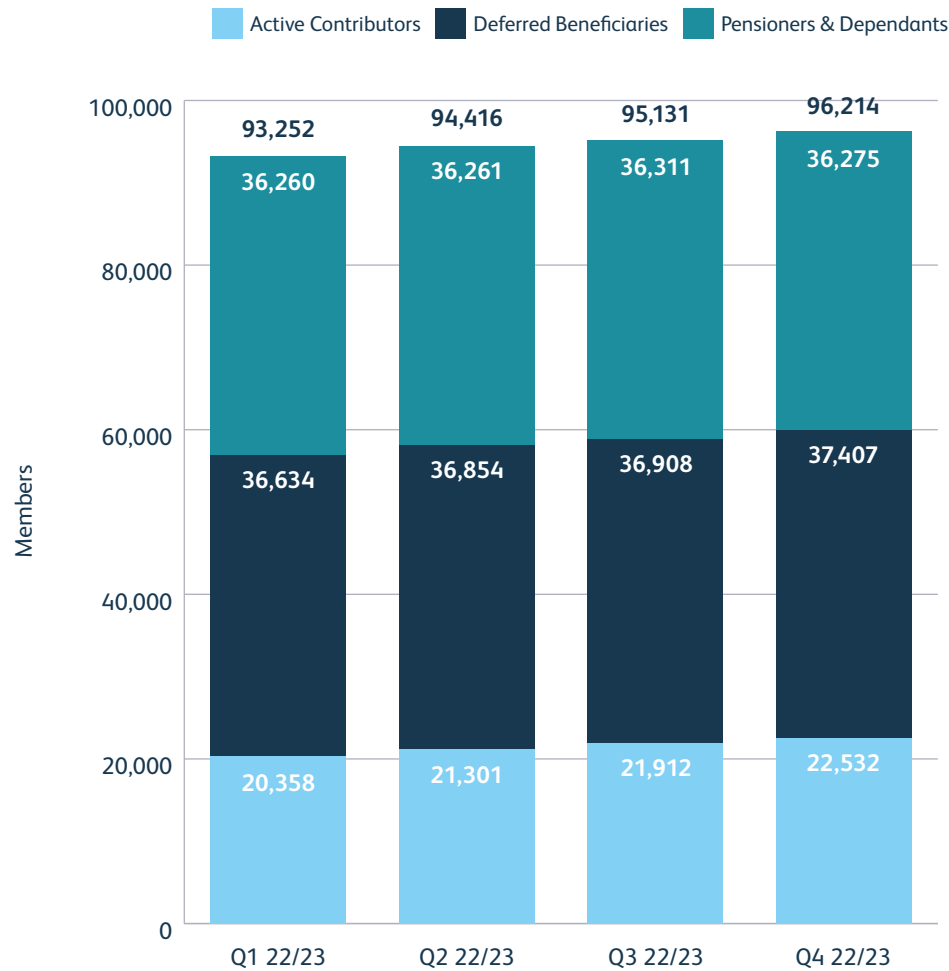
- Total Fund membership
- Current Age Demographic

TOTAL FUND MEMBERSHIP



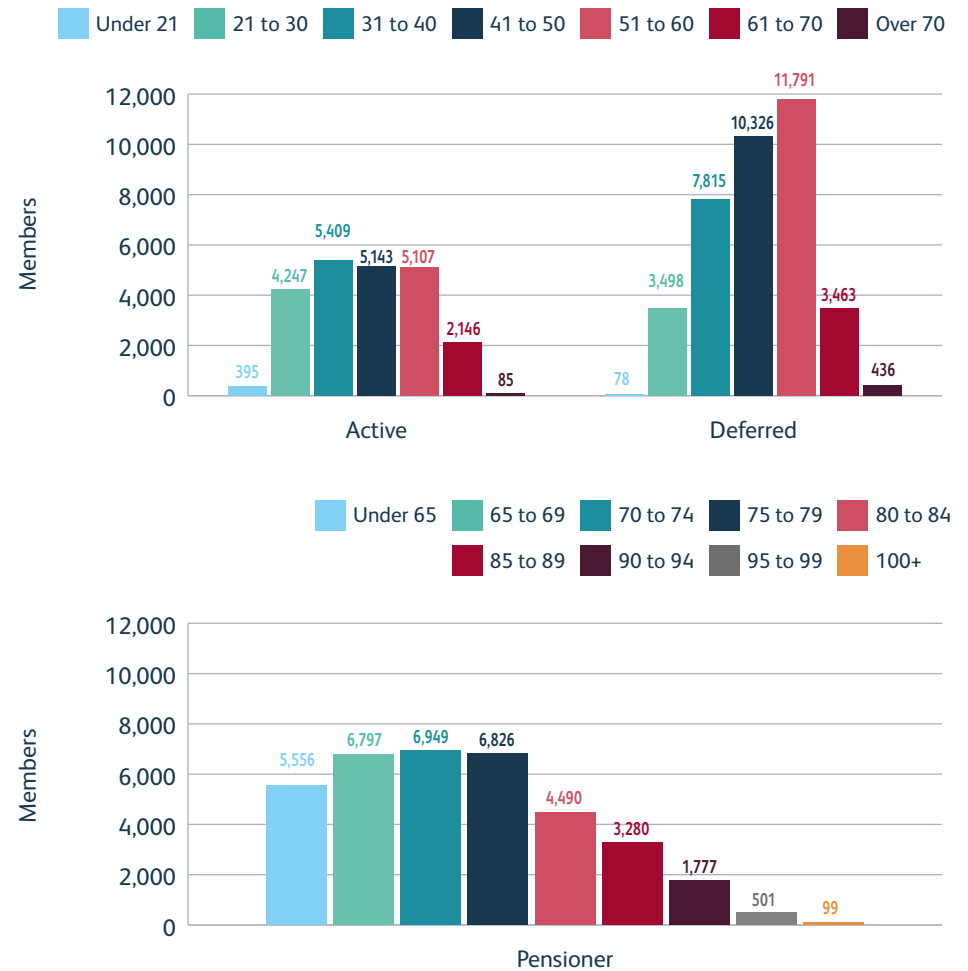
TOTAL FUND MEMBERSHIP

CLIENT SPECIFIC



CURRENT AGE DEMOGRAPHIC

CLIENT SPECIFIC



Casework Performance Against SLA

In this section...

- Performance – All cases
- Performance Standard

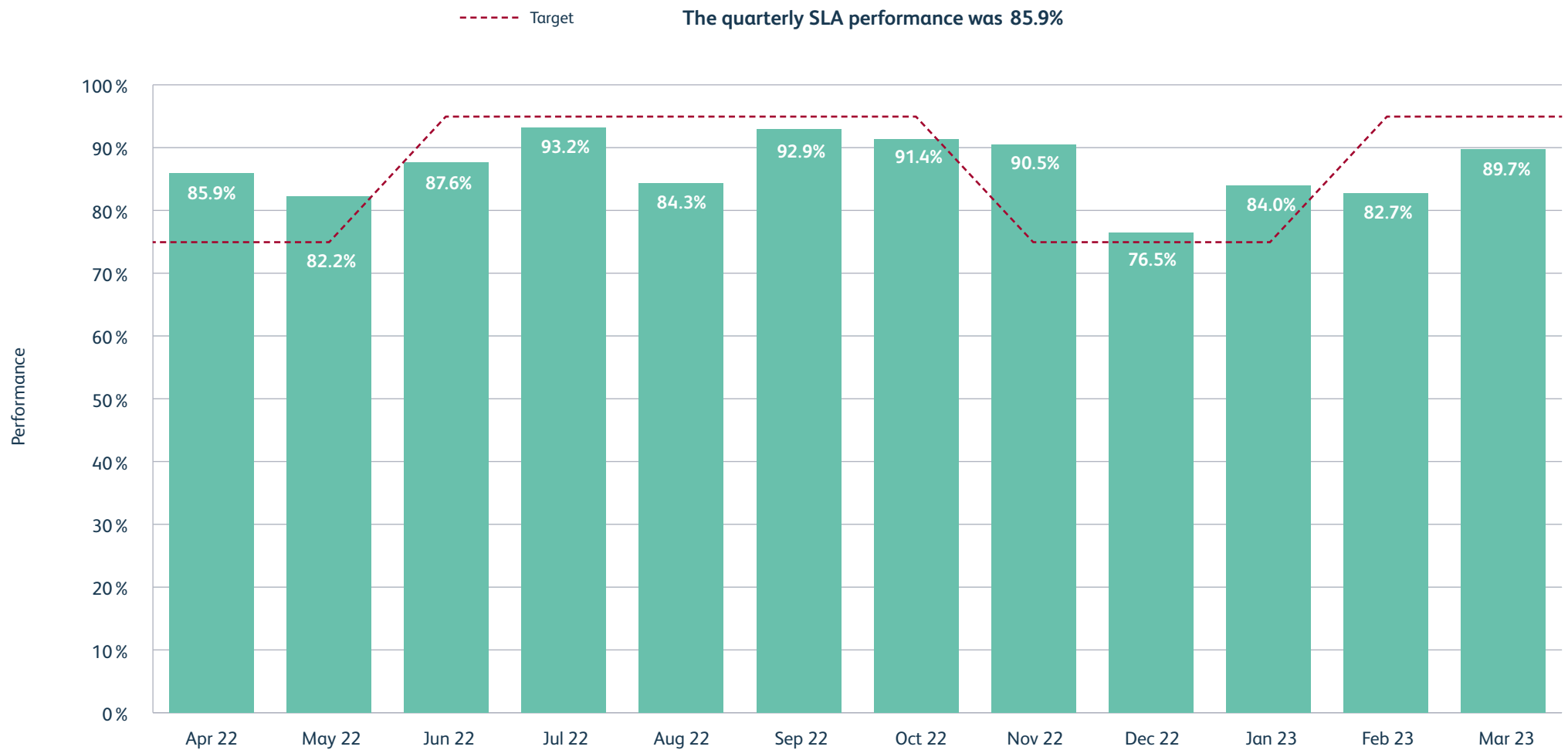
CASEWORK PERFORMANCE AGAINST SLA

For annual data, please see the **Annual Appendix – page 4**



PERFORMANCE – ALL CASES

CLIENT SPECIFIC



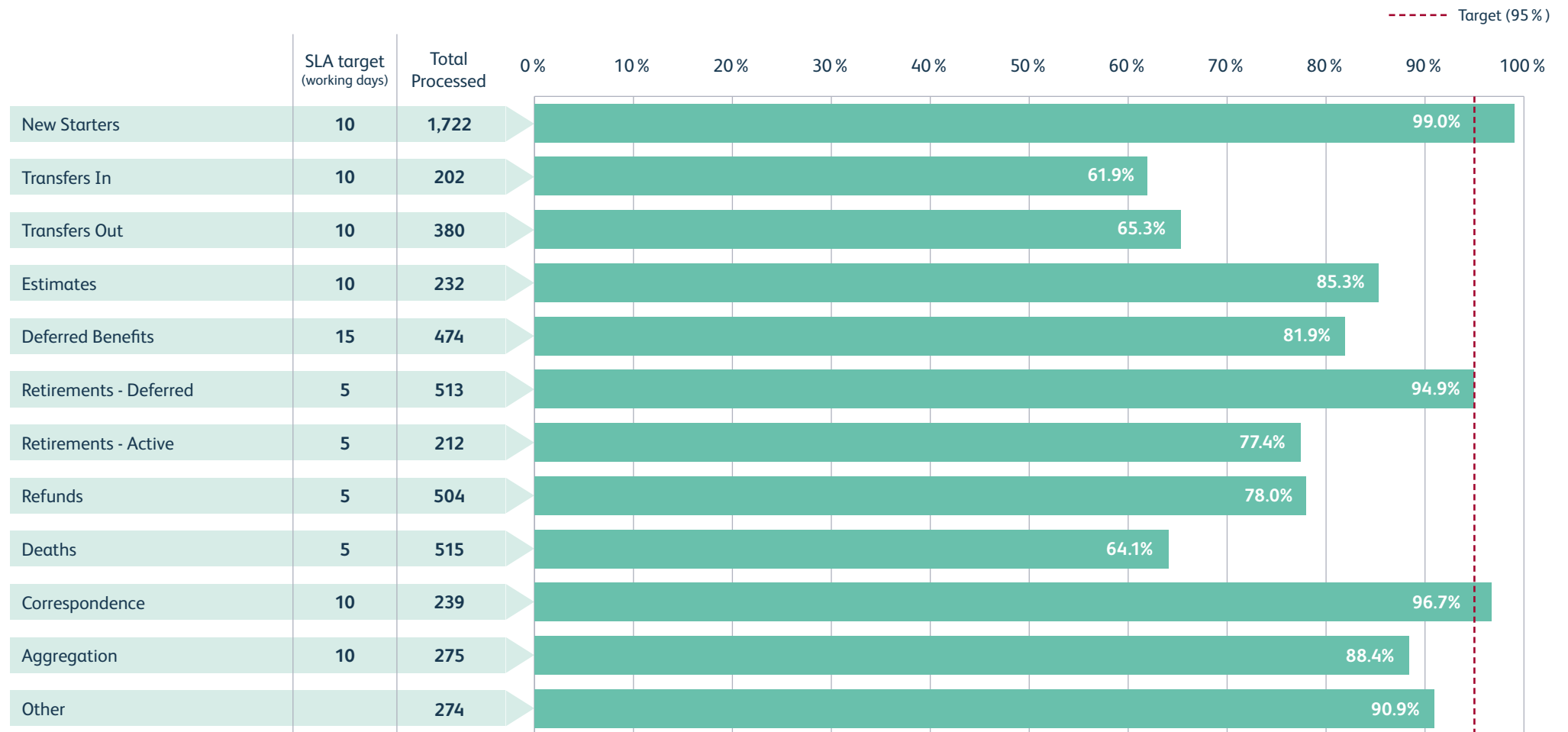
CASEWORK PERFORMANCE AGAINST SLA

For annual data, please see the **Annual Appendix – page 5**



PERFORMANCE STANDARD

CLIENT SPECIFIC





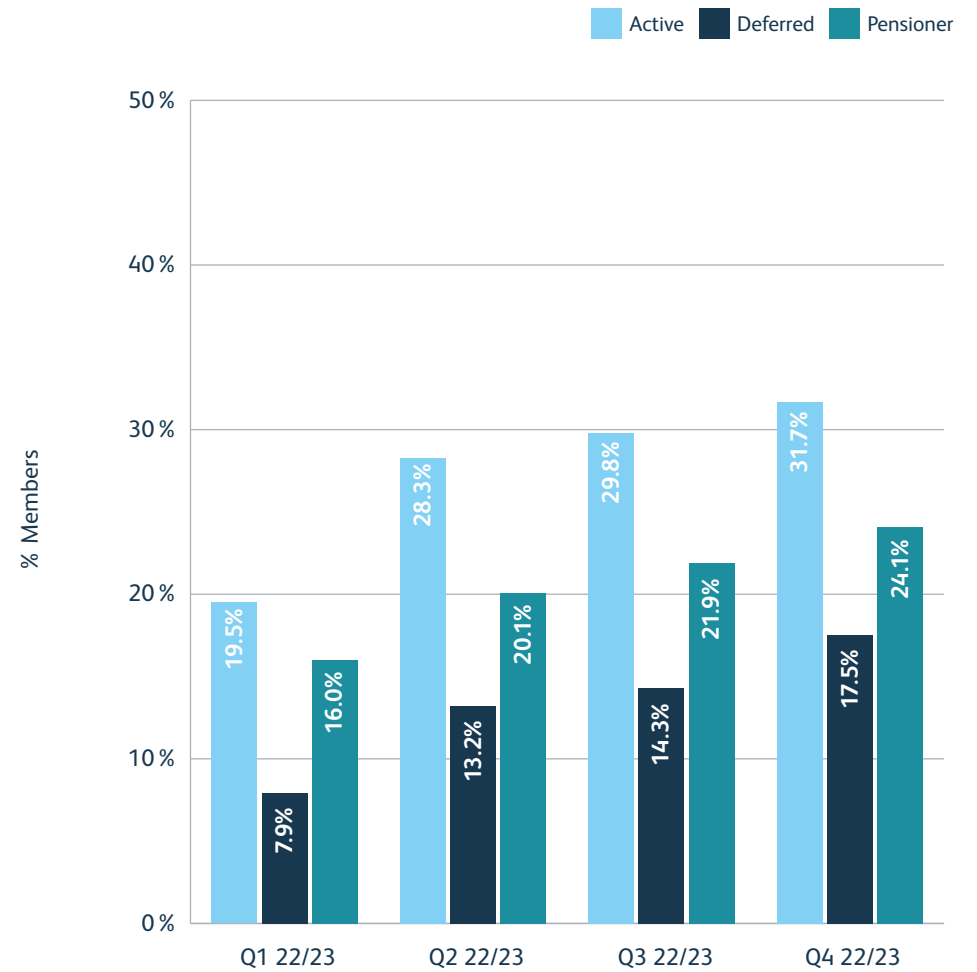
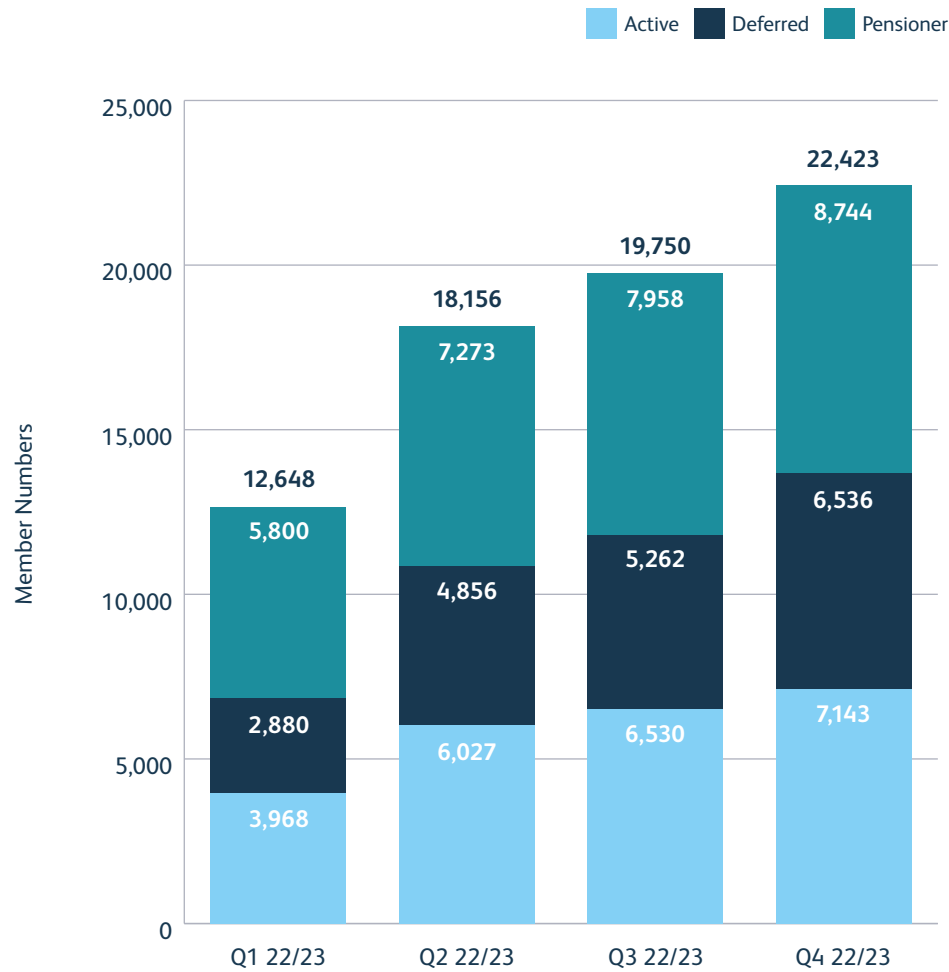
Member Online Portal

In this section...

- Members registered

MEMBERS REGISTERED

CLIENT SPECIFIC



EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



DELIVERED

ALL LPPA

1. A [member panel email](#) was issued, asking for feedback on the new LPPA Help Hub, which was launched in December on the LPPA website.
2. Emails, to a cross-section of members from all clients, inviting them to [join the member panel](#) were sent out in January.
3. A pension increases web page was created to update members on the latest pension increases.
4. Further website developments (additional pages) went live in Q4 including:
 - [New Joiners](#)
 - [Member contribution rates \(23/24\)](#)
 - [Additional Pension Contributions \(APC\)](#)
 - [Pension pay dates \(23/24\)](#)
 - [Updating Your Bank Details](#)
 - [Retirement Guide for Leavers](#) (updated)
 - [Tier 3 Ill Health Retirement](#) (updated)
5. In preparation for McCloud remedy, [further communications](#) were issued to fund employers to ensure that historic data submissions have been accurately supplied (specifically hours worked and service break data).
6. A [McCloud roadmap webpage](#) was also created for our clients.
7. [Several bite-sized video FAQs](#) were developed to help answer some of the more popular member questions, including opting out, and information on the 50:50 option.
8. New Frequently Asked Questions (FAQs) were added to the LPPA website, following the Spring Budget, [including updates on Lifetime Allowance \(LTA\) and annual allowance](#). A news story was also added to the [website](#).
9. The automated Helpdesk (recorded) message was updated to include details of how to access P60 documents for retired members (from April).
10. [A joint press release was issued with Civica](#), following the completed switch to the UPM administration platform.
11. LinkedIn posts were issued in Q1 covering a wide range of topics including:
 - Pension health checks
 - LPPA's Cyber Essentials Plus certification
 - Pension increases
 - Safer internet day
 - PensionPoint ('register to enjoy the benefits')
 - Employer Monthly Return training
 - LGBT history month
 - Chinese New Year
 - '100,000' members registered on PensionPoint
 - International Women's Day
 - LPPA Client forum
 - Spring Budget (2023)
 - Monthly Returns

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



EMPLOYERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
04 Jan	London Councils	Employer Visit	1
05 Jan	La Retraite RC Girls School	Submitting Monthly Returns	1
05 Jan	BFI	Submitting Monthly Returns	1
05 Jan	Computacenter	Submitting Monthly Returns	1
05 Jan	UAL	Submitting Monthly Returns	2
05 Jan	Goldsmiths' University	Submitting Monthly Returns	1
05 Jan	Food Standards Scotland	Submitting Monthly Returns	1
05 Jan	Lee Valley Regional Park Authority	Submitting Monthly Returns	1
05 Jan	London Open College Federation	Submitting Monthly Returns	1
05 Jan	London Councils	Submitting Monthly Returns	1
05 Jan	London Metropolitan University	Submitting Monthly Returns	1
05 Jan	University of Greenwich	Submitting Monthly Returns	1
05 Jan	Mary Ward Centre	Submitting Monthly Returns	1
10 Jan	London Councils	UPM Employer Portal	2
10 Jan	Ibstock Place School	UPM Employer Portal	1
10 Jan	UAL	UPM Employer Portal	1
11 Jan	London Legacy	Employer Visit	1
12 Jan	Food Standards Agency	Employer Visit	1
17 Jan	La Retraite RC Girls School	Submitting Monthly Returns	1
17 Jan	National Learning and Work Institute	Submitting Monthly Returns	1
17 Jan	Freedom Leisure	Submitting Monthly Returns	1
17 Jan	Compass Contract Services	Submitting Monthly Returns	1
17 Jan	UK Anti-Doping	Submitting Monthly Returns	2
17 Jan	Computacenter	Submitting Monthly Returns	1
17 Jan	London Councils	Submitting Monthly Returns	1
17 Jan	LSBU	Submitting Monthly Returns	3
17 Jan	NSL Limited	Submitting Monthly Returns	1

Date	Employer	Activity	Number in attendance
17 Jan	UAL	Submitting Monthly Returns	1
17 Jan	Valuation Tribunal Service	Submitting Monthly Returns	1
17 Jan	Poplar HARCA	Submitting Monthly Returns	1
17 Jan	University of Greenwich	Submitting Monthly Returns	1
17 Jan	Geffrye Museum Trust	Submitting Monthly Returns	1
17 Jan	Orchard Hill Primary Academy Trust	Submitting Monthly Returns	1
18 Jan	Valuation Tribunal Service	Employer Visit	1
19 Jan	Poplar HARCA	LGPS Scheme Essentials	1
19 Jan	University of Westminster	LGPS Scheme Essentials	1
19 Jan	Orchard Hill Primary Academy Trust	LGPS Scheme Essentials	1
19 Jan	Commission For Local Administration	LGPS Scheme Essentials	1
19 Jan	London Open College Federation	LGPS Scheme Essentials	1
19 Jan	UAL	LGPS Scheme Essentials	1
19 Jan	Sport England	LGPS Scheme Essentials	1
19 Jan	UK Anti-Doping	LGPS Scheme Essentials	1
02 Feb	Horniman Museum	Submitting Monthly Returns	1
02 Feb	Orchard Hill Primary Academy Trust	Submitting Monthly Returns	2
02 Feb	Poplar HARCA	Submitting Monthly Returns	1
02 Feb	Education Development Trust	Submitting Monthly Returns	1
02 Feb	Bishop Thomas Grant School	Submitting Monthly Returns	1
02 Feb	Wandsworth Council	Submitting Monthly Returns	2
02 Feb	Food Standards Agency	Submitting Monthly Returns	2
02 Feb	Brunel University	Submitting Monthly Returns	2
02 Feb	University of Westminster	Submitting Monthly Returns	4
02 Feb	Dulwich College	Submitting Monthly Returns	1
02 Feb	UAL	Submitting Monthly Returns	1
02 Feb	L B Islington	Submitting Monthly Returns	1

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



EMPLOYERS CONTINUED

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
02 Feb	SSAFA	Submitting Monthly Returns	1
02 Feb	City Lit	Submitting Monthly Returns	3
02 Feb	RB Greenwich	Submitting Monthly Returns	1
02 Feb	Morley College	Submitting Monthly Returns	2
02 Feb	La Retraite RC Girls School	Submitting Monthly Returns	1
02 Feb	Dataplan	Submitting Monthly Returns	1
02 Feb	Immanuel & St Andrew CE School	Submitting Monthly Returns	1
02 Feb	East London Waste Authority	Submitting Monthly Returns	2
03 Feb	Horniman Museum	Employer Visit	1
09 Feb	UAL	Employer Visit	1
17 Feb	University of St Mark & St John	Employer Visit	1
22 Feb	Bishop Thomas Grant School	Submitting Monthly Returns	1
22 Feb	Dulwich College	Submitting Monthly Returns	1
22 Feb	Roehampton University	Submitting Monthly Returns	1
22 Feb	South Thames College Group	Submitting Monthly Returns	2
22 Feb	Learning On Screen	Submitting Monthly Returns	1
22 Feb	Sport England	Submitting Monthly Returns	1
22 Feb	London Councils	Submitting Monthly Returns	1
22 Feb	Valuation Tribunal Service	Submitting Monthly Returns	1
22 Feb	LB Lewisham	Submitting Monthly Returns	1
22 Feb	Geffrye Museum Trust	Submitting Monthly Returns	1
22 Feb	London Fire Brigade	Submitting Monthly Returns	1
22 Feb	Commission For Local Administration	Submitting Monthly Returns	1
22 Feb	University of St Mark & St John	Employer Visit	2
02 Mar	SSAFA	Submitting Monthly Returns	1
02 Mar	Roehampton University	Submitting Monthly Returns	1
02 Mar	Coram Fields	Submitting Monthly Returns	1

Date	Employer	Activity	Number in attendance
02 Mar	City University	Submitting Monthly Returns	1
02 Mar	Step Angel Oak	Submitting Monthly Returns	1
02 Mar	Sport England	Submitting Monthly Returns	1
02 Mar	Learning On Screen	Submitting Monthly Returns	1
07 Mar	SITA UK	UPM Employer Portal	2
07 Mar	EIS2WIN	UPM Employer Portal	1
07 Mar	GLA	UPM Employer Portal	2
09 Mar	Step Angel Oak	Scheme Leavers	1
09 Mar	SITA UK	Scheme Leavers	1
09 Mar	NSL Limited	Scheme Leavers	1
09 Mar	City University	Scheme Leavers	1
09 Mar	United Colleges Group	Scheme Leavers	1
09 Mar	Poplar HARCA	Scheme Leavers	1
09 Mar	La Retraite RC Girls School	Scheme Leavers	1
09 Mar	Commission For Local Administration	Scheme Leavers	1
14 Mar	Roehampton University	Submitting Monthly Returns	1
14 Mar	NCG	Submitting Monthly Returns	1
14 Mar	Compass Contract Services	Submitting Monthly Returns	1
14 Mar	East London Waste Authority	Submitting Monthly Returns	1
14 Mar	Association of Colleges	Submitting Monthly Returns	1
14 Mar	Mitie	Submitting Monthly Returns	1
14 Mar	Roehampton University	Submitting Monthly Returns	1
14 Mar	Trinity Laban Conservatoire of Music & Dance	Submitting Monthly Returns	1
14 Mar	SITA UK	Submitting Monthly Returns	1
14 Mar	Southbank Colleges	Submitting Monthly Returns	2
16 Mar	GLA	Employer Visit	3
20 Mar	Capital City College Group	Employer Visit	1

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



EMPLOYERS CONTINUED

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
21 Mar	SITA UK	PensionPoint Awareness	1
23 Mar	University of Westminster	Year End Training	1
23 Mar	Alpha Numeric	Year End Training	1
23 Mar	LSEC	Year End Training	1
23 Mar	Roehampton University	Year End Training	3
23 Mar	Mitie	Year End Training	1
23 Mar	Capital College Group	Year End Training	1
30 Mar	L B Lewisham	Submitting Monthly Returns	1
30 Mar	Capital College Group	Submitting Monthly Returns	2
30 Mar	Goldsmiths' University	Submitting Monthly Returns	1
30 Mar	Ibstock Place School	Submitting Monthly Returns	1
30 Mar	Valuation Office Agency	Submitting Monthly Returns	1
30 Mar	Notting Hill Genesis	Submitting Monthly Returns	1
30 Mar	Food Standards Scotland	Submitting Monthly Returns	1
30 Mar	LB Tower Hamlets	Submitting Monthly Returns	1
30 Mar	City University	Submitting Monthly Returns	1
30 Mar	United Colleges Group	Submitting Monthly Returns	1
30 Mar	mitie	Submitting Monthly Returns	1
31 Mar	UAL	Employer Visit	2



MEMBERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
10 Jan	LPFA Members	Making sense of your pension	6
12 Jan	LPFA Members	Making sense of retirement	4
07 Feb	LPFA Members	Making sense of retirement	105
06 Mar	LPFA Members	Making sense of your pension	64
09 Mar	LPFA Members	Making sense of retirement	41

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

For annual data, please see the **Annual Appendix – pages 16 & 17**



EMAILS – EMPLOYERS

CLIENT SPECIFIC

January

- Pension Pulse (UPM Special)
- Monthly data returns training

February

- Annual returns / Important information on 2022 / 23 submissions

March

- Annual returns / Important information on 2022 / 23 submissions (Reminder)
- Pension Pulse (March 2023)
- McCloud Data Collection (first)
- McCloud data file collection (follow up)



EMAILS – MEMBERS

CLIENT SPECIFIC

January

- Member training - Making Sense of Your Pension / Retirement

February

- Member survey
- Member panel / News Hub (small selection across multiple funds)
- Member survey / Reminder 1

March

- Member panel / invitation (small selection across multiple funds)
- Member survey / Reminder 2
- Member survey / Last chance

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	20	126	53
Duplicate effective date in status history	6	73	40
Gender is not Male or Female	0	0	0
Duplicate entries in status history	30	84	64
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	35	29	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	4	1	0
Last entry in status history does not match current status	113	28	27
Member has no address	76	2,447	114
Missing Forename(s)	0	0	0
Missing State Retirement Date	0	0	0
Missing postcode	72	2,539	153
Missing Date Joined Pensionable Service	4	0	0
Total Fails	373	5,327	454
Individual Fails	276	2,769	294
Total Members	22,532	37,407	36,275
Accuracy Rate	98.8%	92.6%	99.2%
Total accuracy rate			96.5%

CONDITIONAL DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	247
AVC's/Additional Contributions	156
Deferred Benefits	20
Tranches (DB)	341
Gross Pension (Pensioners)	32
Tranches (Pensioners)	244
Gross Pension (Dependants)	14
Tranches (Dependants)	47
Date of Leaving	1,825
Date Joined Scheme	1,866
Employer Details	6
Salary	170
Crystallisation	1,571
Annual Allowance	1,503
LTA Factors	705
Date Contracted Out	450
Pre-88 GMP	1,483
Post-88 GMP	704
Total Fails	11,384
Individual Fails	8,228
Total Members	96,214
Accuracy Rate	91.4%