



# LPP

Local Pensions Partnership  
Administration

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London Pensions Fund Authority

## Quarterly Administration Report

1st July – 30th September 2023

[lppapensions.co.uk](http://lppapensions.co.uk)

# DEFINITIONS

## Page 8

### **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 10

### **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 11

### **Casework Performance - Standard**

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

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

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 12

### **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 not limited to, the deletion of a process or changes in assigned categories).

## 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.

## Page 20 & 21

### **Member Online Portal**

The number and percentage of member records by status, that are registered for LPPA's Member Self-Service facility, PensionPoint.

## Page 29

### **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 (details that are specific to the Member) and Scheme Specific 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 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](#) 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 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24
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 Q2 2023/24 (July – September 2023)

Casework and Helpdesk performance metrics continue to trend in the right direction, but this is not yet translating fully through to the member, employer and client experience.

### Payroll

All pensioner payroll and lump sum payments due in the reporting period were made on time (this equates to over £100 million, across all clients, in pension payments per month).

### Statutory deadlines

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

- Annual Benefit Statements for eligible active and deferred members
- Newsletter issued to active and deferred members.

### Casework SLA performance

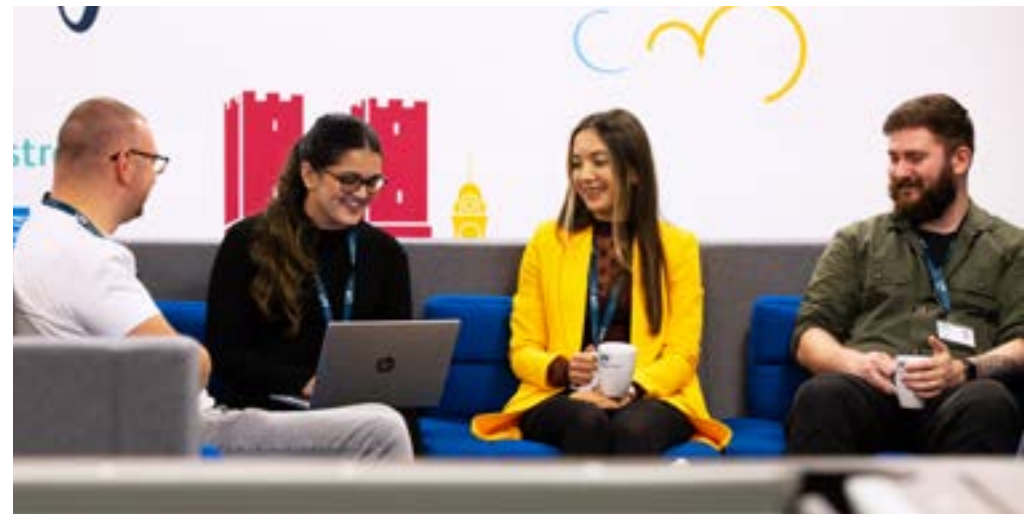
Overall performance against SLAs is back above the targeted 95% however, performance has been impacted by a focus to clear cases that had already missed the SLA. Cases that have missed SLA impact the performance measure when they are completed, and not when they miss.

### Satisfaction scores

Helpdesk and Retirement satisfaction scores are now reported at client level and for the last 12 months. Moving away from 'All LPPA' reporting reduces the number of completed member surveys, which affects the visual presentation of the graphs. However, it does provide a more specific view of satisfaction scores for your members.

### Pensions Helpdesk

Helpdesk performance for average call wait time and number of answered calls is now reported at a client level – the abandoned call rate remains at 'All LPPA' level, as the Helpdesk telephone number is the same for all clients (and therefore it isn't possible to measure abandon rates at client level).



# Fund Membership

## In this section...

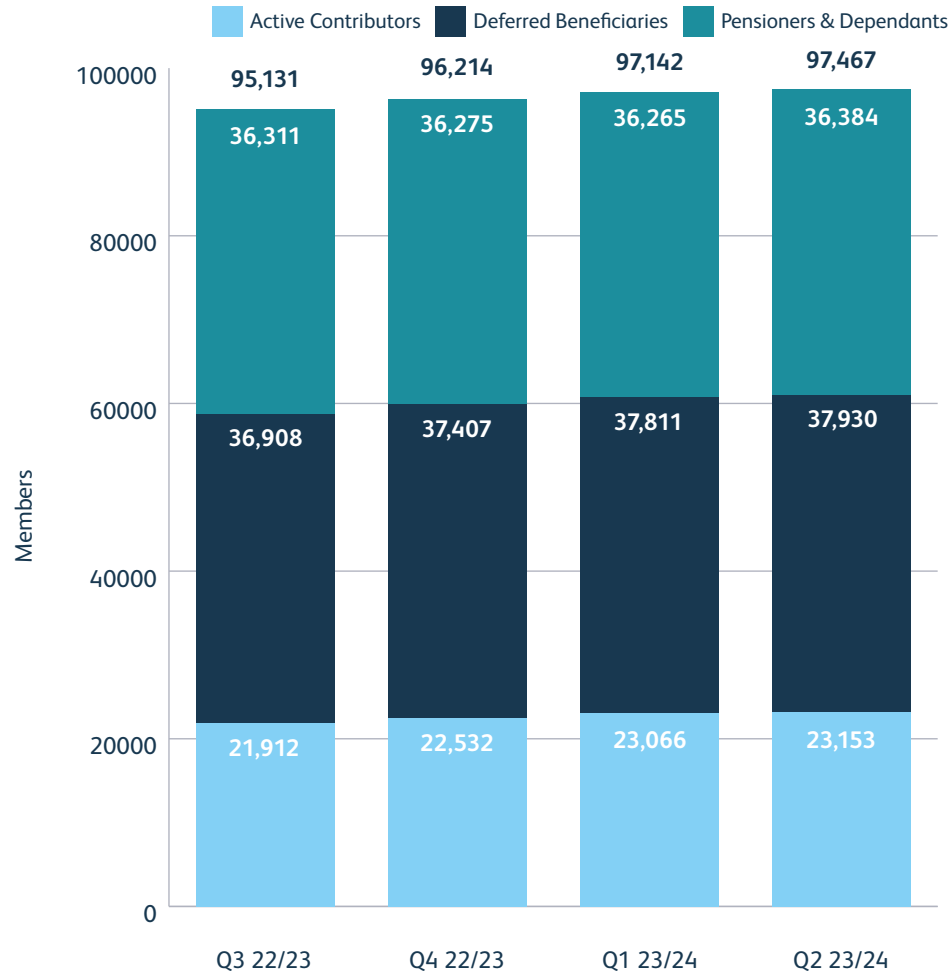
- Total fund membership
- Current age demographic

# TOTAL FUND MEMBERSHIP



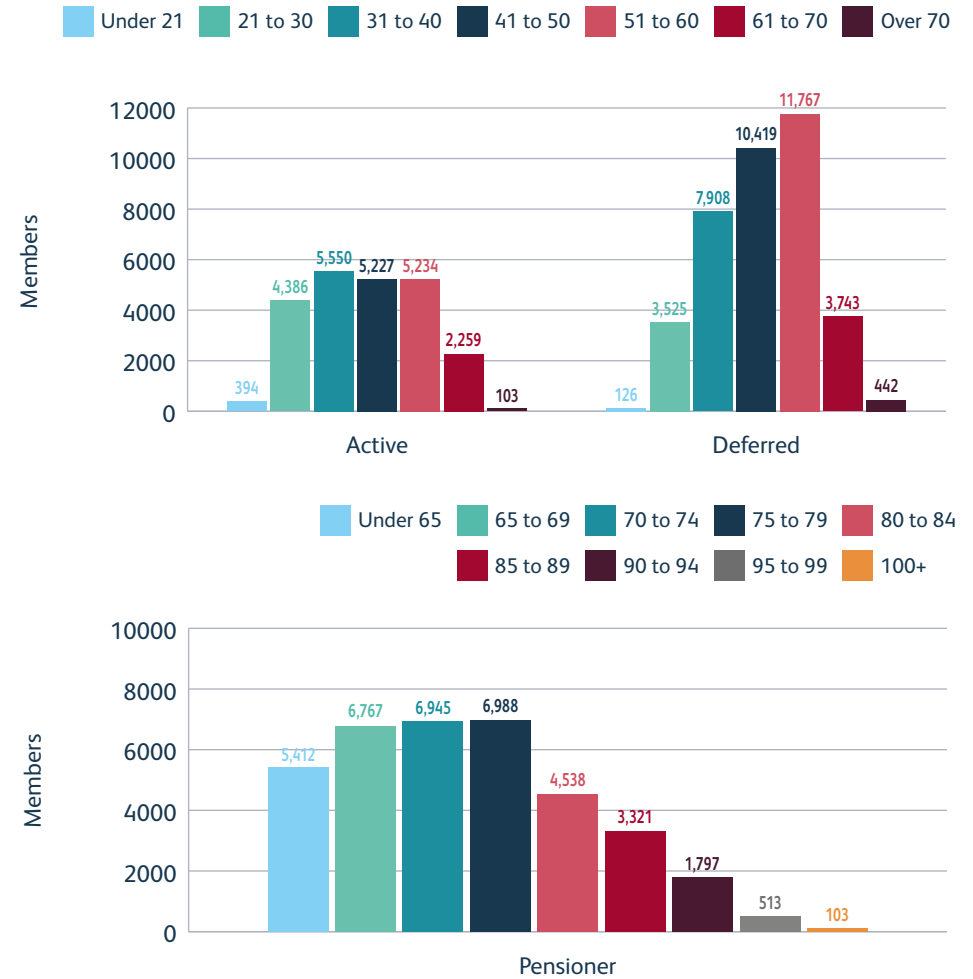
## TOTAL FUND MEMBERSHIP

CLIENT SPECIFIC



## CURRENT AGE DEMOGRAPHIC

CLIENT SPECIFIC



# Casework Performance

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

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



# CASEWORK PERFORMANCE

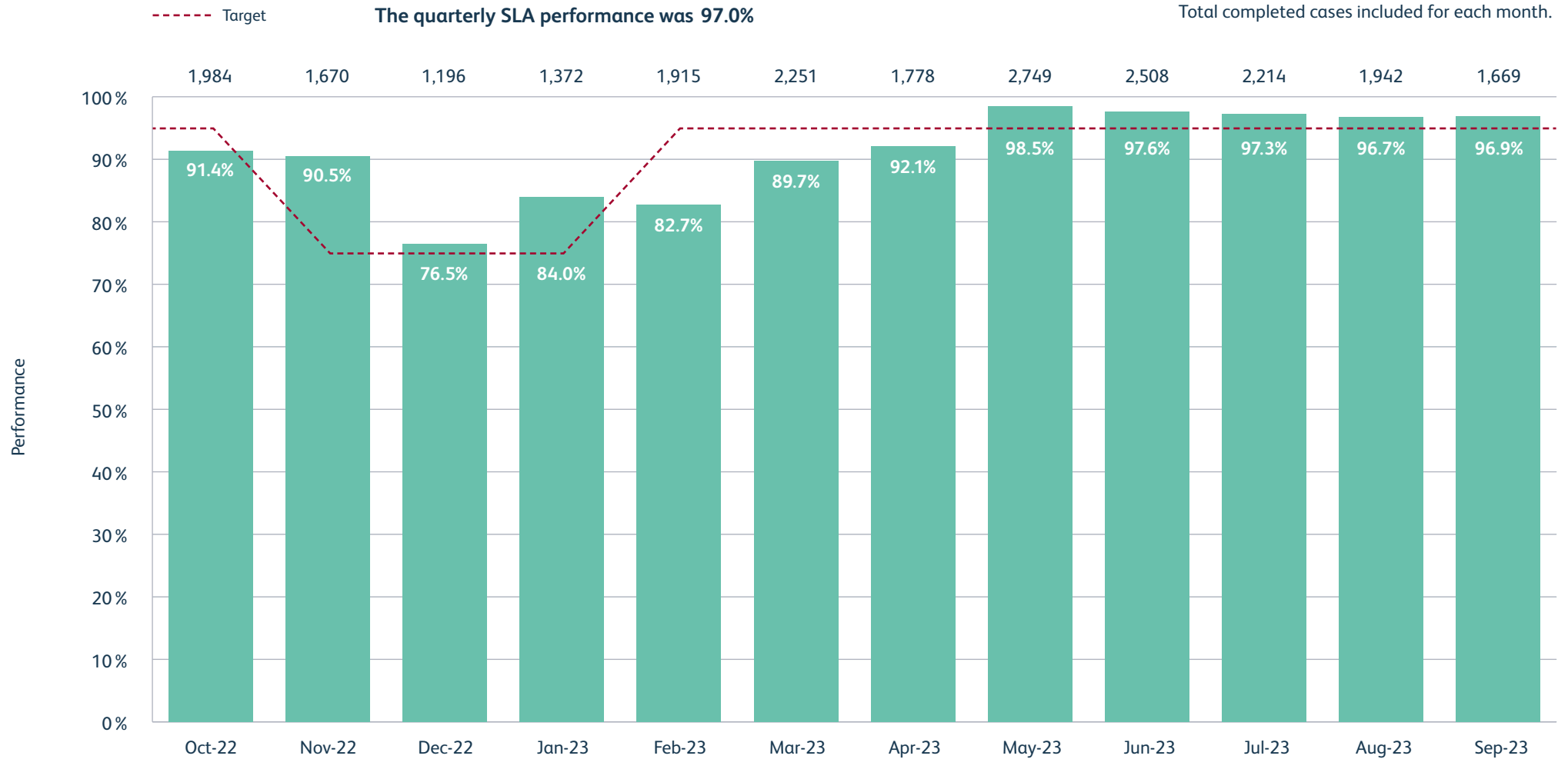
**Please note:**

Agreed with clients that LPPA's monthly operational targets would be relaxed from Nov 22 to Jan 23, in line with UPM migration timings (22/23).



## PERFORMANCE – ALL CASES

CLIENT SPECIFIC



# CASEWORK PERFORMANCE



## PERFORMANCE STANDARD

## CLIENT SPECIFIC





# Member Online Portal

## In this section...

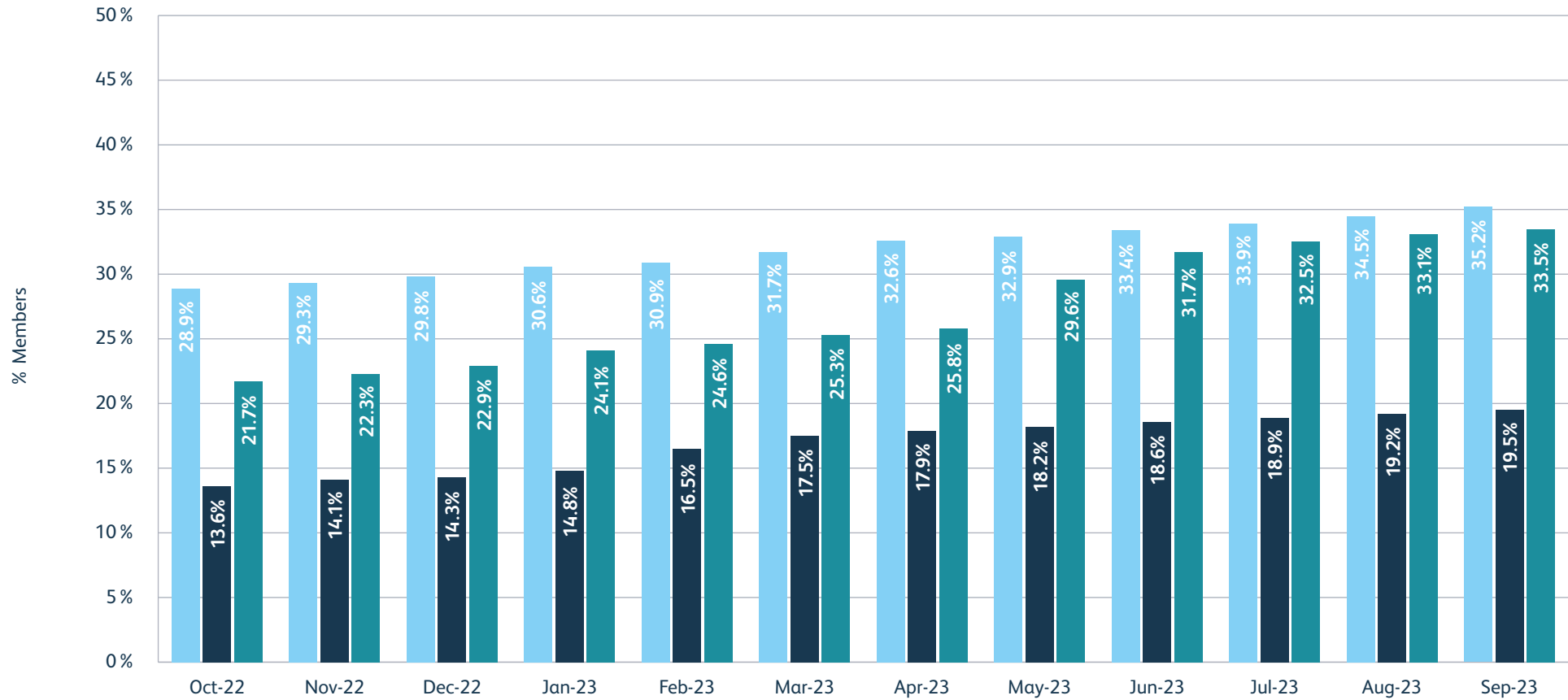
- Total members registered
- Members registered (%)



MEMBERS REGISTERED (%)

CLIENT SPECIFIC

Active Deferred Pensioner



# Employer Engagement & Member Communication Activity

## In this section...

- Delivered
- Scheduled
- Engagement communications (Employers & Members)

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

## DELIVERED

ALL LPPA

- [Pension Pulse](#) bulletin (employer newsletter) was issued to all employers.
- A separate email communicating [GAD factor changes](#) was also issued to all employers.
- An annual LPPA [Member newsletter](#) was produced for active/deferred members. Articles included pension increases, cost of living tips and member real-life stories.
- Member emails communicating [newsletter and ABS](#) were issued in July and August.
- [Automated email notifications](#) went live, alerting employers when they have unresolved data queries in their UPM portal work feed.
- Employers were also updated on [LGA training resources](#).
- Following feedback from members, a new “Service History” page went live in PensionPoint for active LG members. This now provides information on employment service, transfers and CARE history.
- The LPPA website was updated to provide more information for LG members on the [impact of remedy](#) (including links to the LGPS McCloud remedy page).
- Several emails were issued in September to employers, to provide updates on improvements to UPM employer portal functionality (generating [member estimates](#) – this now includes Tier 1 and 2 ill health), new [training sessions](#) and an update on [ABS activity](#).

## SCHEDULED

ALL LPPA

- Remedy / McCloud information will continue to be added to the LPPA website for members, including additional updates from the LGA (Local Government Association).
- Further enhancements to the UPM employer portal planned.
- Additional PensionPoint development planned.
- Online LPPA Employer Forum planned for 23 November 23.

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- 21 Virtual employer visits were held with LPFA employers
- Absence and Ill Health training was delivered with 4 people across 3 employers attending
- 8 employers attended LGPS Scheme Essentials Training
- 1 employer attended Scheme Leavers training
- UPM employer portal training was delivered with 6 employers attending
- Employer responsibilities training was delivered with 5 employers attending
- Submitting monthly returns training was delivered and 6 employers attended
- Monthly member sessions were delivered, with 18 LPFA Fund members attending the Making Sense of your Pension sessions and 16 attended the Making Sense of your Retirement session



# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## EMPLOYERS

### CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
05 Jul	LFB	Virtual Employer Visit	2
11 Jul	SUEZ	LGPS Scheme Essentials	1
18 Jul	Transport for London	Virtual Employer Visit	2
19 Jul	L B Southwark	Virtual Employer Visit	1
21 Jul	L B Tower Hamlets	Virtual Employer Visit	1
24 Jul	Brunel University	Virtual Employer Visit	2
25 Jul	Brunel University	Virtual Employer Visit	2
03 Aug	South Thames College Group	Scheme Leavers	1
04 Aug	GLA	Virtual Employer Visit	1
04 Aug	Old Oak & Park Royal	Virtual Employer Visit	1
07 Aug	Monks Walk School	Virtual Employer Visit	1
14 Aug	Valuation Office Agency	Virtual Employer Visit	1
15 Aug	L B Lambeth	Virtual Employer Visit	1
23 Aug	Julians Primary School	Virtual Employer Visit	1
29 Aug	London Legacy	Virtual Employer Visit	1
30 Aug	Brunel University	Virtual Employer Visit	1
01 Sep	Mary Ward Settlement	Virtual Employer Visit	1
05 Sep	SUEZ	Absence and Ill Health	1
05 Sep	Valuation Office Agency	Absence and Ill Health	1
05 Sep	Valuation Office Agency	Absence and Ill Health	1
05 Sep	GLA	Absence and Ill Health	1
07 Sep	UK Sports Institute	Submitting Monthly Returns	1
07 Sep	East London Waste Authority	Submitting Monthly Returns	3
07 Sep	London Metropolitan University	Submitting Monthly Returns	1
07 Sep	Scottish Government	Submitting Monthly Returns	1
12 Sep	London Councils	UPM Employer Portal	1
12 Sep	City University	UPM Employer Portal	1
12 Sep	Scottish Government	UPM Employer Portal	2

Date	Employer	Activity	Number in attendance
12 Sep	Brunel University	UPM Employer Portal	2
12 Sep	South Thames College Group	UPM Employer Portal	1
12 Sep	London Metropolitan University	UPM Employer Portal	1
14 Sep	Food Standards Agency	Virtual Employer Visit	1
19 Sep	St Francesca Cabrini	Virtual Employer Visit	2
20 Sep	London Treasury Ltd	Virtual Employer Visit	1
21 Sep	Scottish Government	Employer Responsibilities	1
21 Sep	UK Sports Institute	Employer Responsibilities	1
21 Sep	LPPI	Employer Responsibilities	1
21 Sep	Valuation Office Agency	Employer Responsibilities	1
21 Sep	Food Standards Agency	Employer Responsibilities	1
26 Sep	CBRE	Virtual Employer Visit	1
26 Sep	Lee Valley Regional Park Authority	LGPS Scheme Essentials	1
26 Sep	Brunel University	LGPS Scheme Essentials	1
26 Sep	Food Standards Agency	LGPS Scheme Essentials	1
26 Sep	Brunel University	LGPS Scheme Essentials	1
26 Sep	London Metropolitan University	LGPS Scheme Essentials	1
26 Sep	Scottish Government	LGPS Scheme Essentials	1
26 Sep	Valuation Office Agency	LGPS Scheme Essentials	1
26 Sep	South Thames College Group	LGPS Scheme Essentials	1
26 Sep	London Councils	Virtual Employer Visit	2



# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## MEMBERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
18 Jul	All LPFA employers	Making sense of your pension	6
20 Jul	All LPFA employers	Making sense of retirement	4
15 Aug	All LPFA employers	Making sense of your pension	4
17 Aug	All LPFA employers	Making sense of retirement	7
19 Aug	All LPFA employers	Making sense of retirement	5
21 Aug	All LPFA employers	Making sense of your pension	8



# Data Quality

## In this section...

- TPR data scores
- Common data
- Scheme specific data

# END OF QUARTER DATA QUALITY (TPR SCORES)

## COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	67	127	57
Duplicate effective date in status history	6	136	53
Gender is not Male or Female	19	2	0
Duplicate entries in status history	31	142	76
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	43	30	3
Missing Surname	0	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	12	0	0
No entry in the status history	4	1	0
Last entry in status history does not match current status	121	31	31
Member has no address	174	2,408	119
Missing Forename(s)	0	0	0
Missing State Retirement Date	19	2	0
Missing postcode	170	2,480	138
Missing Date Joined Pensionable Service	1	0	0
<b>Total Fails</b>	<b>667</b>	<b>5,359</b>	<b>477</b>
<b>Individual Fails</b>	<b>454</b>	<b>2,780</b>	<b>301</b>
<b>Total Members</b>	<b>23,153</b>	<b>37,930</b>	<b>36,384</b>
<b>Accuracy Rate</b>	<b>98.0%</b>	<b>92.7%</b>	<b>99.2%</b>
<b>Total accuracy rate</b>			<b>96.4%</b>

## Please note:

The increase in Q2 Annual Allowance and CARE errors is linked to the year-end data return process and outstanding leavers, which is subject to ongoing work between employers and LPPA. The scores are expected to improve over the coming months as queries are resolved and leavers are processed



## SCHEME SPECIFIC DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	240
AVC's/Additional Contributions	143
Deferred Benefits	19
Tranches (DB)	365
Gross Pension (Pensioners)	31
Tranches (Pensioners)	578
Gross Pension (Dependants)	17
Tranches (Dependants)	96
Date of Leaving	223
Date Joined Scheme	240
Employer Details	6
Salary	919
Crystallisation	436
CARE Data	3,093
CARE Revaluation	11
Annual Allowance	2,242
LTA Factors	734
Date Contracted Out	443
Pre-88 GMP	1,549
Post-88 GMP	755
<b>Total Fails</b>	<b>12,140</b>
<b>Individual Fails</b>	<b>9,618</b>
<b>Total Members</b>	<b>97,467</b>
<b>Accuracy Rate</b>	<b>90.1%</b>

# LPP

Local Pensions Partnership  
Administration