

OUR



TO BE  
THE PENSION  
ADMINISTRATOR  
OF CHOICE  
TO THE  
PUBLIC SECTOR

# LPP

Local Pensions Partnership  
Administration

London Pensions Fund Authority

## Quarterly Administration Report

1st October - 31st December 2023

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

## 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 Q3 2023/24 (October – December 2023)

Casework and Helpdesk performance metrics continue to trend in the right direction.

### Payroll

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

### Statutory deadlines

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

- Pension Saving Statements
- HMRC Scheme Returns

### Casework SLA performance

Overall performance against SLAs is above the targeted 95% and has been consistently achieved since May 2023. Performance is above or close to the 95% target in the key areas of Bereavements and Retirements.

### Satisfaction scores

Helpdesk and Retirement satisfaction scores are now reported at client level as a rolling 12 month view. Moving away from the reporting across all LPPA clients will result in a reduced number of surveys completed and will affect the visual of the graphs but provides a clear view of the satisfaction in respect of your members.

### Pensions Helpdesk

Helpdesk performance for average call wait time and number of answered calls is now reported at a client level, abandoned rate remains across all LPPA clients as we do not know which client a member was calling from until after a call has been accepted.



# Fund Membership

## In this section...

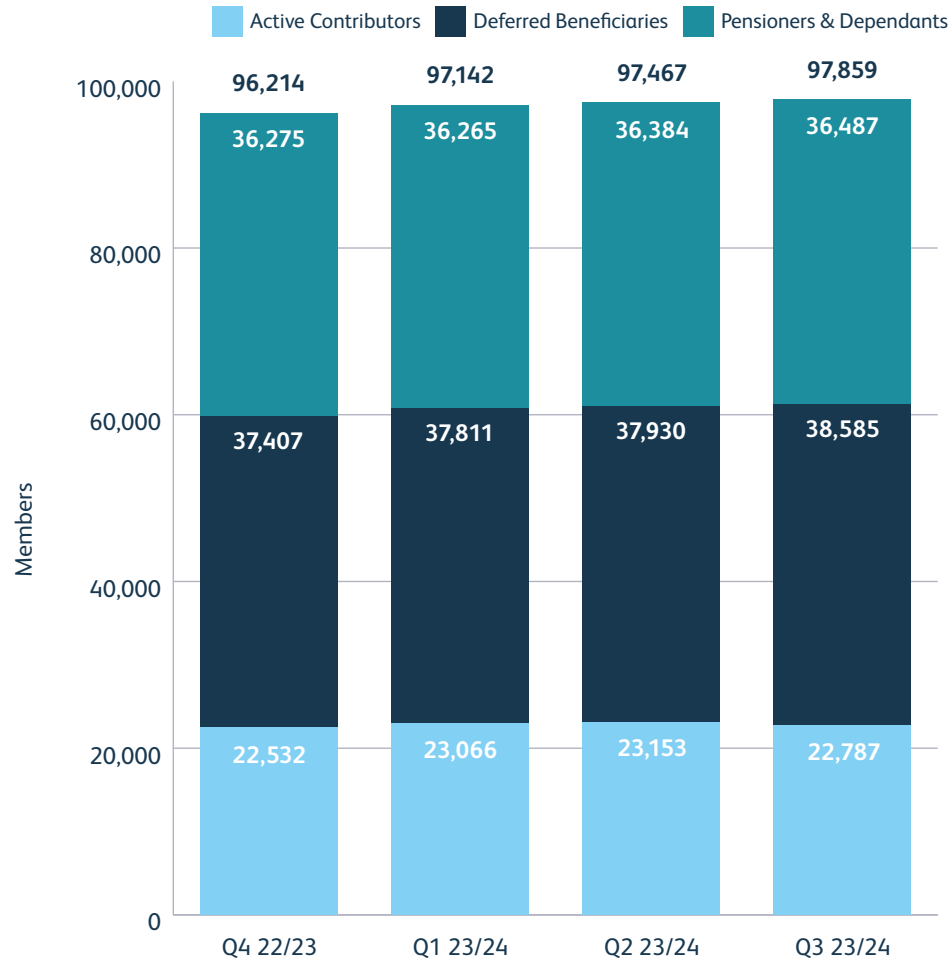
- Total fund membership
- Current age demographic

# TOTAL FUND MEMBERSHIP



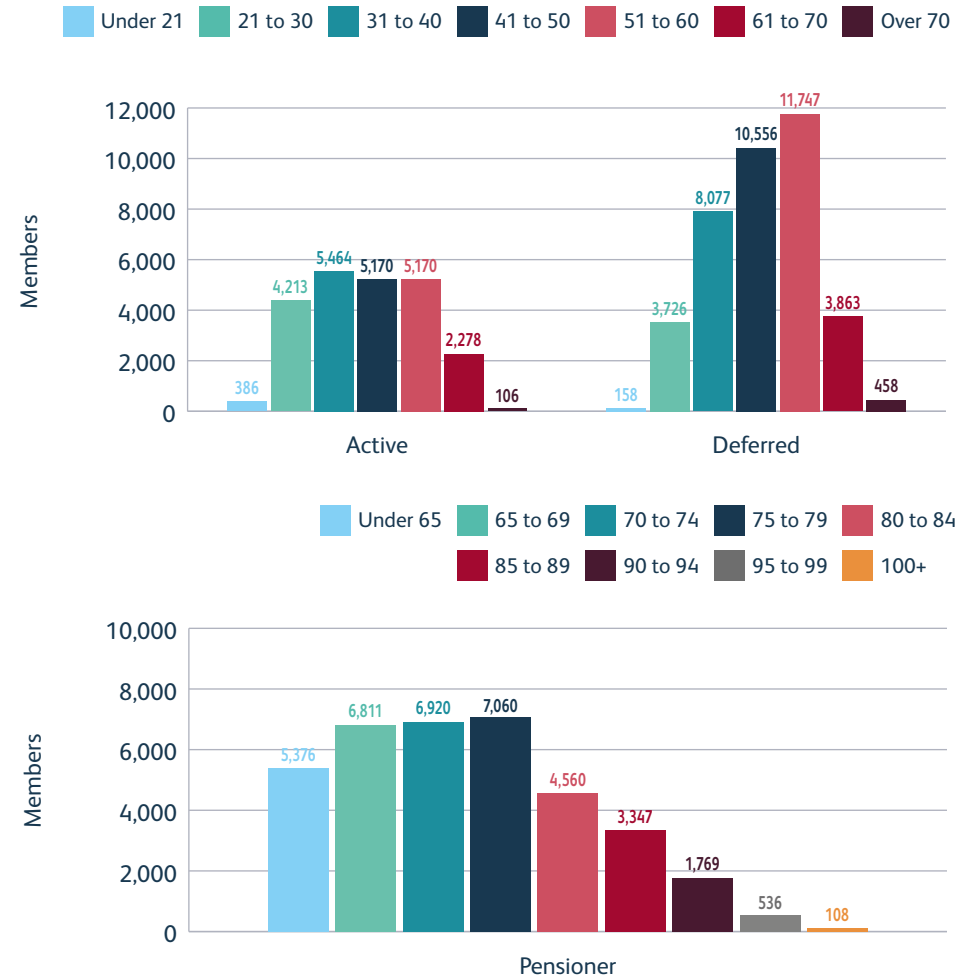
## TOTAL FUND MEMBERSHIP

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

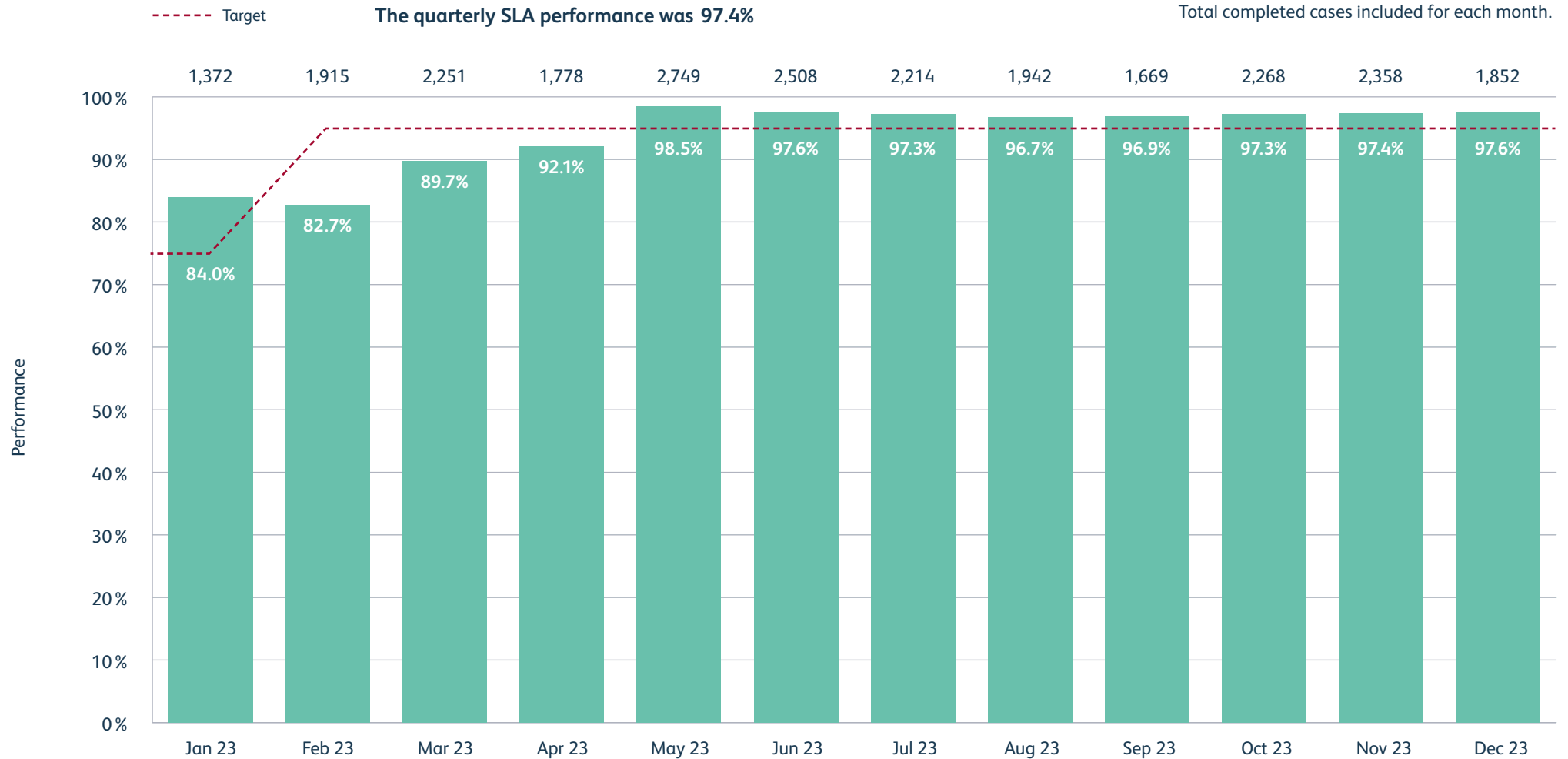
**Please note:**

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



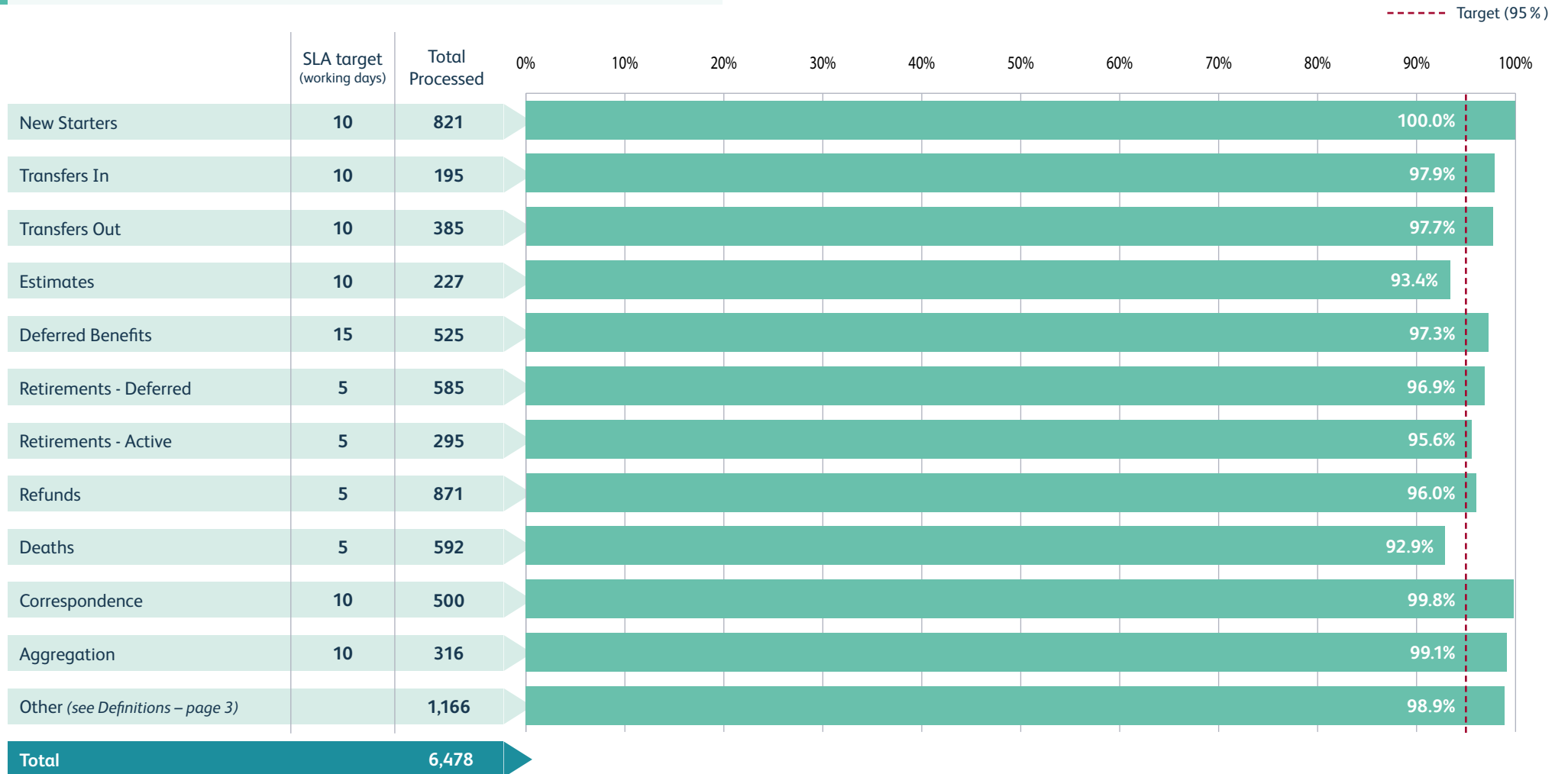


# CASEWORK PERFORMANCE



## PERFORMANCE STANDARD

## CLIENT SPECIFIC





# Member Online Portal

## In this section...

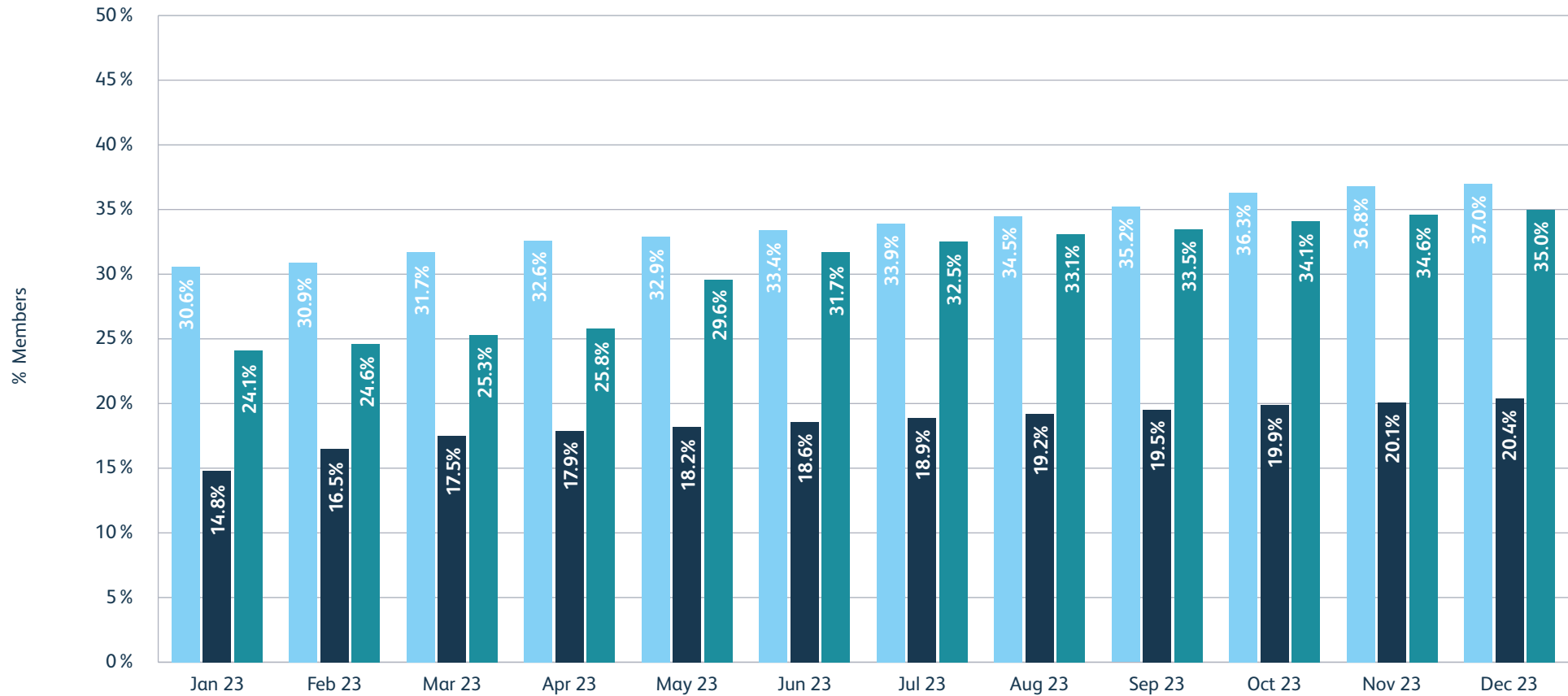
- Total members registered
- Members registered (%)



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

- The [member contact form](#) was improved to assist member self-service requests for information contained on the LPPA website – this has resulted in more member visits to retirement and PensionPoint pages (FAQ's, how to videos etc).
- Monthly return files - reminder [emails](#) and telephone calls to non-submitting employers were issued / actioned, to ensure that support is provided, as well as highlighting the impact if files are not up-to-date, ready for the production of ABS documents in 2024.
- An employer email promoting [Get Online week](#) was issued.
- A McCloud (LGPS) client round table was facilitated by LPPA to provide a business (project) and communications update, together with a discussion on employer data requirements, followed by a Q&A.
- The [Employer toolkit](#) page was updated (simplified) on the LPPA website.
- An [email invite](#) was issued promoting the virtual LPPA Employer Forum (23 November 23).
- [Pension Pulse](#) (newsletter) was issued to employers and focused on the LPPA Employer Forum (including a link to the session recording), the employer toolkit and a reminder that member estimates can be generated in the employer portal.

- Several new resource pages were added to the LPPA website:

[Increasing your pension benefits](#) - provides members with information on taking out an AVC, APC or added pension.

[Age discrimination remedy pages](#) – explaining how members are affected by the McCloud judgement.

New [Forms, documents and scheme information](#) page added.

[GMP page](#) and [Trivial commutation](#) pages added to the LPPA website.

## SCHEDULED

ALL LPPA

- The LPPA Communications team are working on planned improvements to the retirement section of the LPPA website.
- Communications will be issued to employers to ensure that the 'reasons for leaving' are as specified (for leavers included in the monthly return file), to help facilitate a move towards bulk submission of leavers later in the year.
- Communications are planned to employers to highlight the importance of 'on-time retirement notifications' to LPPA, and how the leaver process can support them to ensure the member retirement experience is enhanced.
- Email communications and telephone calls will continue to non-submitting (monthly return file) employers, and updates will be provided to clients.

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- 9 Virtual employer visits were held with LPFA employers
- Absence and Ill Health training was delivered with 7 employers attending
- 5 employers attended LGPS Scheme Essentials Training
- 8 employers attended Scheme Leavers training
- UPM employer portal training was delivered with 10 employers attending
- Employer Responsibilities training was delivered with 16 employers attending
- Submitting monthly returns training was delivered and 18 employers attended
- 28 people from LPFA employers attended the Employer Forum
- Monthly member sessions were delivered, with 17 LPFA Fund members attending the Making Sense of your Pension sessions and 19 attended the Making Sense of your Retirement session



# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## EMPLOYERS

### CLIENT SPECIFIC

| Date   | Employer                             | Activity                           | Number in attendance |
|--------|--------------------------------------|------------------------------------|----------------------|
| 04 Oct | Submitting Monthly Returns           | Camden                             | 1                    |
| 04 Oct | Submitting Monthly Returns           | Scottish Government                | 1                    |
| 04 Oct | Submitting Monthly Returns           | 00024 London South East Colleges   | 1                    |
| 04 Oct | Submitting Monthly Returns           | Orchard Hill College Academy Trust | 1                    |
| 04 Oct | Submitting Monthly Returns           | Scottish Government FSS            | 1                    |
| 04 Oct | Submitting Monthly Returns           | UK Sports Institute                | 2                    |
| 04 Oct | Submitting Monthly Returns           | Lee Valley Regional Park Authority | 1                    |
| 04 Oct | Submitting Monthly Returns           | GLA                                | 1                    |
| 04 Oct | Submitting Monthly Returns           | Lee Valley Regional Park Authority | 1                    |
| 10 Oct | Employer Responsibilities            | Camden                             | 1                    |
| 10 Oct | Employer Responsibilities            | Brunel University                  | 1                    |
| 10 Oct | Employer Responsibilities            | Chrysalis                          | 1                    |
| 10 Oct | Employer Responsibilities            | LA Sainte Union Catholic School    | 1                    |
| 10 Oct | Employer Responsibilities            | Orchard Hill College Academy Trust | 1                    |
| 10 Oct | Employer Responsibilities            | Greater London Authority           | 1                    |
| 10 Oct | Employer Responsibilities            | LPPI                               | 1                    |
| 17 Oct | UPM Employer Portal                  | Camden                             | 1                    |
| 17 Oct | UPM Employer Portal                  | South Thames College Group         | 1                    |
| 17 Oct | UPM Employer Portal                  | Scottish Government                | 1                    |
| 17 Oct | UPM Employer Portal                  | UK Sports Institute                | 1                    |
| 17 Oct | UPM Employer Portal                  | Orchard Hill College Academy Trust | 1                    |
| 17 Oct | UPM Employer Portal                  | Lambeth                            | 1                    |
| 17 Oct | UPM Employer Portal                  | Valuation Office Agency            | 1                    |
| 17 Oct | UPM Employer Portal                  | Lee Valley Regional Park Authority | 1                    |
| 17 Oct | UPM Employer Portal                  | GLA                                | 1                    |
| 17 Oct | UPM Employer Portal                  | UK Anti-Doping                     | 1                    |
| 18 Oct | Scheme Leavers - UPM employer portal | Camden                             | 1                    |

| Date   | Employer                             | Activity   | Number in attendance |
|--------|--------------------------------------|--|----------------------|
| 18 Oct | Scheme Leavers - UPM employer portal | Scottish Government  | 1                    |
| 18 Oct | Scheme Leavers - UPM employer portal | UK Sports Institute  | 1                    |
| 18 Oct | Scheme Leavers - UPM employer portal | St. Michael's Catholic College                                   | 1                    |
| 31 Oct | Virtual Employer Visit               | London Metropolitan University                                   | 2                    |
| 02 Nov | Absence and Ill Health               | Scottish Government  | 2                    |
| 02 Nov | Absence and Ill Health               | LA Sainte Union Catholic School                                  | 1                    |
| 02 Nov | Absence and Ill Health               | Roehampton University  | 1                    |
| 02 Nov | Absence and Ill Health               | GLA  | 1                    |
| 02 Nov | Absence and Ill Health               | London south East college  | 1                    |
| 02 Nov | Absence and Ill Health               | Goldsmiths, University of London                                 | 1                    |
| 02 Nov | Absence and Ill Health               | OHCAT  | 1                    |
| 07 Nov | Submitting Monthly Returns           | UK Sports Institute  | 1                    |
| 07 Nov | Submitting Monthly Returns           | SG Foods Standards Scotland                                      | 1                    |
| 07 Nov | Submitting Monthly Returns           | NCG  | 1                    |
| 07 Nov | Submitting Monthly Returns           | St. Michael's Catholic College                                   | 1                    |
| 07 Nov | Submitting Monthly Returns           | Goldsmiths, University of London                                 | 2                    |
| 07 Nov | Submitting Monthly Returns           | London Borough of Barking and Dagenham east lond Waste authority | 1                    |
| 07 Nov | Submitting Monthly Returns           | Lee Valley Regional Park Authority                               | 1                    |
| 07 Nov | Submitting Monthly Returns           | Orchard Hill College and Academy Trust                           | 1                    |
| 09 Nov | Virtual Employer Visit               | London Metropolitan University                                   | 2                    |
| 13 Nov | Employer Responsibilities            | SG Foods Standard Scotland                                       | 1                    |
| 13 Nov | Employer Responsibilities            | Lppi   | 1                    |
| 13 Nov | Employer Responsibilities            | St. Michael's Catholic College                                   | 1                    |
| 13 Nov | Employer Responsibilities            | London South East College  | 1                    |
| 13 Nov | Employer Responsibilities            |  | 1                    |
| 14 Nov | Employer Responsibilities            | Computacenter UK Limited   | 1                    |
| 14 Nov | Virtual Employer Visit               | Brunel University  | 1                    |
| 21 Nov | LGPS Scheme Essentials               | Brunel University  | 1                    |
| 21 Nov | LGPS Scheme Essentials               | Chrysalis  | 1                    |
| 21 Nov | LGPS Scheme Essentials               | Scottish Government  | 1                    |
| 21 Nov | LGPS Scheme Essentials               | South Thames College Group                                       | 1                    |
| 21 Nov | LGPS Scheme Essentials               | Valuation Office Agency  | 1                    |
| 23 Nov | Employer Forum                       | British Film Institute   | 1                    |
| 23 Nov | Employer Forum                       | Computacenter UK Limited   | 3                    |
| 23 Nov | Employer Forum                       | East London Waste Authority                                      | 1                    |

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## EMPLOYERS

CLIENT SPECIFIC

| Date   | Employer                             | Activity   | Number in attendance |
|--------|--------------------------------------|--|----------------------|
| 23 Nov | Employer Forum                       | ELWA   | 2                    |
| 23 Nov | Employer Forum                       | Food Standards Scotland  | 1                    |
| 23 Nov | Employer Forum                       | Goldsmiths University of London                                  | 1                    |
| 23 Nov | Employer Forum                       | Greater London Authority   | 1                    |
| 23 Nov | Employer Forum                       | La Sainte Union  | 1                    |
| 23 Nov | Employer Forum                       | LB Hackney   | 1                    |
| 23 Nov | Employer Forum                       | Lee Valley Regional Park Authority                               | 1                    |
| 23 Nov | Employer Forum                       | London Borough of Barking and Dagenham east lond Waste authority | 1                    |
| 23 Nov | Employer Forum                       | London Borough of Islington                                      | 1                    |
| 23 Nov | Employer Forum                       | London Borough of Lambeth  | 1                    |
| 23 Nov | Employer Forum                       | London Borough of Tower Hamlets                                  | 1                    |
| 23 Nov | Employer Forum                       | London South East Colleges                                       | 1                    |
| 23 Nov | Employer Forum                       | LPFA   | 1                    |
| 23 Nov | Employer Forum                       | LPPI   | 1                    |
| 23 Nov | Employer Forum                       | Pension Shared Service   | 1                    |
| 23 Nov | Employer Forum                       | South Bank Colleges  | 1                    |
| 23 Nov | Employer Forum                       | UK Sports Institute  | 1                    |
| 23 Nov | Employer Forum                       | University Of Westminster  | 2                    |
| 23 Nov | Employer Forum                       | Valuation Office Agency  | 1                    |
| 23 Nov | Employer Forum                       | Wandsworth Council   | 2                    |
| 28 Nov | Virtual Employer Visit               | Capital City College   | 1                    |
| 28 Nov | Virtual Employer Visit               | University of the arts   | 2                    |
| 28 Nov | Virtual Employer Visit               | British Film Institute   | 1                    |
| 28 Nov | Virtual Employer Visit               | UK Sports Institute  | 3                    |
| 30 Nov | Scheme Leavers - UPM employer portal | Chrysalis  | 1                    |

| Date   | Employer                             | Activity                           | Number in attendance |
|--------|--------------------------------------|------------------------------------|----------------------|
| 30 Nov | Scheme Leavers - UPM employer portal | GLA                                | 1                    |
| 30 Nov | Scheme Leavers - UPM employer portal | Goldsmiths, University of London   | 1                    |
| 30 Nov | Scheme Leavers - UPM employer portal | Scottish Government                | 1                    |
| 04 Dec | Submitting Monthly Returns           | OHCAT                              | 1                    |
| 04 Dec | Virtual Employer Visit               | New City College                   | 2                    |
| 12 Dec | Employer Responsibilities            | Foods Standard Scotland            | 1                    |
| 12 Dec | Employer Responsibilities            | GLA                                | 1                    |
| 12 Dec | Employer Responsibilities            | Lee Valley Regional Park Authority | 1                    |
| 19 Dec | Virtual Employer Visit               | Roehampton University              | 1                    |



## MEMBERS

CLIENT SPECIFIC

| Date   | Employer                     | Activity     | Number in attendance |
|--------|------------------------------|--------------|----------------------|
| 23 Oct | Making sense of Retirement   | LPFA Members | 4                    |
| 24 Oct | Making sense of your pension | LPFA Members | 5                    |
| 14 Nov | Making sense of Retirement   | LPFA Members | 5                    |
| 16 Nov | Making sense of your pension | LPFA Members | 13                   |
| 05 Dec | Making sense of your pension | LPFA Members | 1                    |
| 07 Dec | Making sense of Retirement   | LPFA Members | 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 /<br>Dependant |
|--|---------------|---------------|--------------------------|
| Invalid or Temporary NI Number                             | 49            | 145           | 59                       |
| Duplicate effective date in status history                 | 1             | 59            | 35                       |
| Gender is not Male or Female                               | 16            | 3             | 0                        |
| Duplicate entries in status history                        | 39            | 83            | 54                       |
| Missing (or known false) Date of Birth                     | 0             | 0             | 0                        |
| Date Joined Scheme greater than first status entry         | 43            | 36            | 4                        |
| Missing Surname  | 0             | 0             | 0                        |
| Incorrect Gender for members title                         | 0             | 0             | 0                        |
| Invalid Date of Birth                                      | 22            | 0             | 0                        |
| No entry in the status history                             | 5             | 1             | 0                        |
| Last entry in status history does not match current status | 110           | 33            | 37                       |
| Member has no address                                      | 164           | 2,393         | 129                      |
| Missing Forename(s)  | 0             | 0             | 0                        |
| Missing State Retirement Date                              | 16            | 3             | 0                        |
| Missing postcode   | 161           | 2,463         | 148                      |
| Missing Date Joined Pensionable Service                    | 1             | 0             | 0                        |
| <b>Total Fails</b>   | <b>627</b>    | <b>5,219</b>  | <b>466</b>               |
| <b>Individual Fails</b>                                    | <b>437</b>    | <b>2,719</b>  | <b>296</b>               |
| <b>Total Members</b>                                       | <b>22,787</b> | <b>38,585</b> | <b>36,487</b>            |
| <b>Accuracy Rate</b>                                       | <b>98.1%</b>  | <b>93.0%</b>  | <b>99.2%</b>             |
| <b>Total accuracy rate</b>                                 |               |               | <b>96.5%</b>             |



## SCHEME SPECIFIC DATA

CLIENT SPECIFIC

| Data Item                     | Fails         |
|-------------------------------|---------------|
| Divorce Records               | 0             |
| Transfer In                   | 236           |
| AVCs/Additional Contributions | 134           |
| Deferred Benefits             | 19            |
| Tranches (DB)                 | 360           |
| Gross Pension (Pensioners)    | 33            |
| Tranches (Pensioners)         | 590           |
| Gross Pension (Dependants)    | 15            |
| Tranches (Dependants)         | 83            |
| Date of Leaving               | 787           |
| Date Joined Scheme            | 802           |
| Employer Details              | 5             |
| Salary                        | 816           |
| Crystallisation               | 435           |
| CARE Data                     | 2,046         |
| CARE Revaluation              | 13            |
| Annual Allowance              | 1,777         |
| LTA Factors                   | 803           |
| Date Contracted Out           | 439           |
| Pre-88 GMP                    | 1,597         |
| Post-88 GMP                   | 787           |
| <b>Total Fails</b>            | <b>11,777</b> |
| <b>Individual Fails</b>       | <b>8,781</b>  |
| <b>Total Members</b>          | <b>97,859</b> |
| <b>Accuracy Rate</b>          | <b>91.0%</b>  |

# LPP

Local Pensions Partnership  
Administration