LPP
Local Pensions Partnership

Havering Pension Fund

# Quarterly Administration Report

1 April to 30 June 2020

Our Core Values

This administration report is produced in accordance with the Service Level Agreement (SLA) for the provision of pension administration services to Havering Pension Fund.

The report describes the performance of Local Pensions Partnership Administration (LPPA) against the standards set out in the SLA during the period 1 April to 30 June 2020.

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.

Our values

- Working together
- Committed to excellence
- Doing the right thing
- Forward thinking
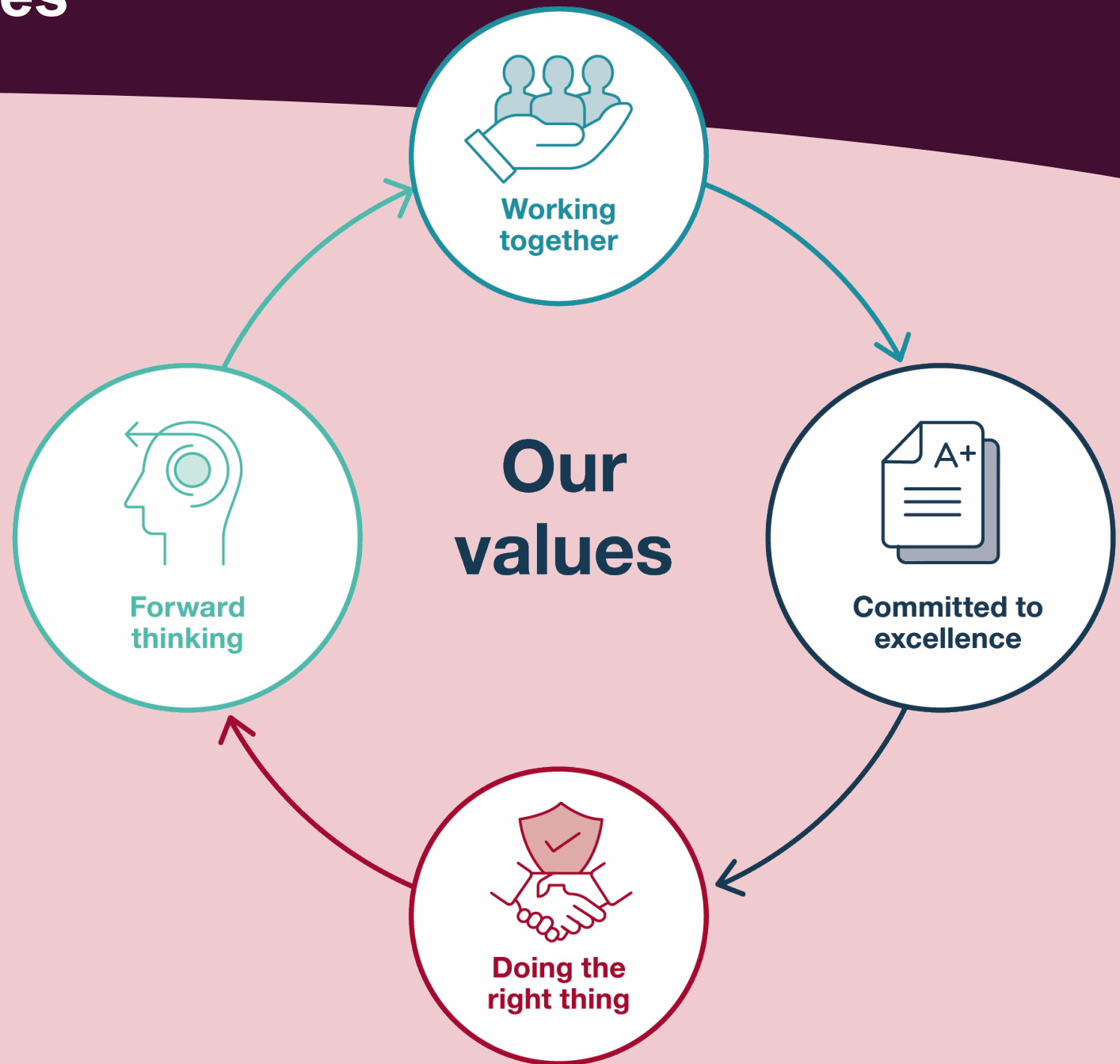
Annual Plan - 2020/21

Forward thinking

Activity

Due ●   Completed ✓

Activity	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21
Annual Benefit Statement and Newsletter to Deferred Members			✓									
Pension Increases		✓										
Annual Benefit Statement and Newsletter to Active Members					●							
Pension Saving Statements							●					
HMRC Scheme Returns							●					
IAS19 data				●	●				●			●

Fund Membership

Total Fund Membership

Stacked bar chart — Members:

Legend: Active Contributors, Deferred Beneficiaries, Pensioner and Dependants

	Q2 19/20	Q3 19/20	Q4 19/20	Q1 20/21
Pensioner and Dependants	6,553	6,601	6,411	6,390
Deferred Beneficiaries	7,312	7,343	6,835	6,867
Active Contributors	6,856	6,900	6,529	6,406

Current Age Demographic

Bar chart — Members

Legend: Under 21, 21 to 30, 31 to 40, 41 to 50, 51 to 60, 61 to 70, Over 70

Categories: Active, Deferred, Pensioner

Fund Membership

Working together
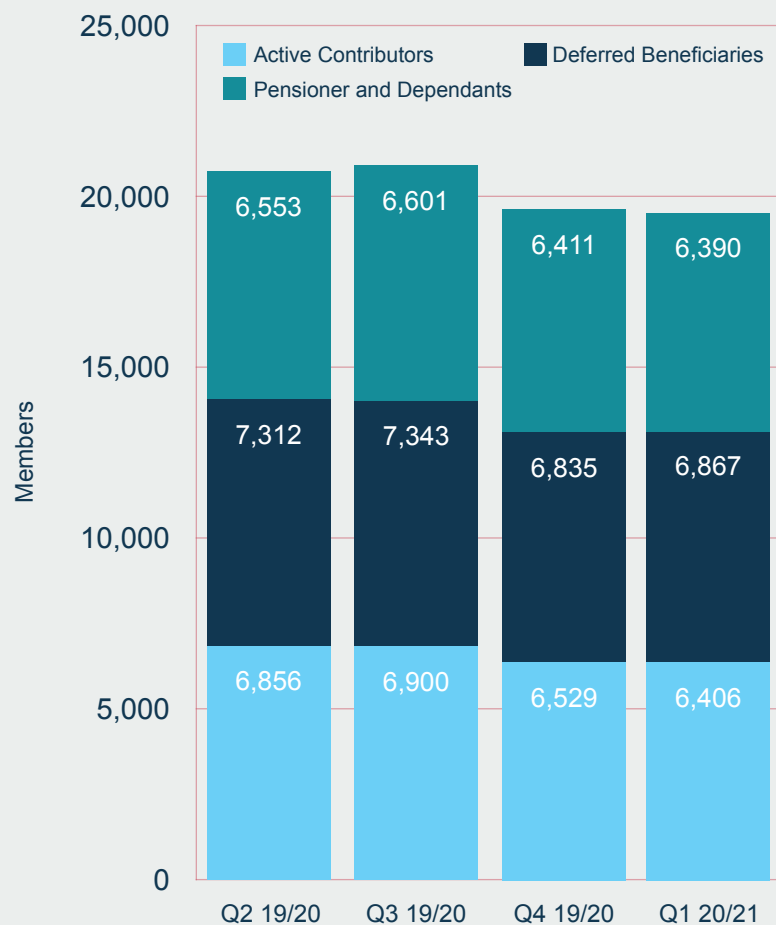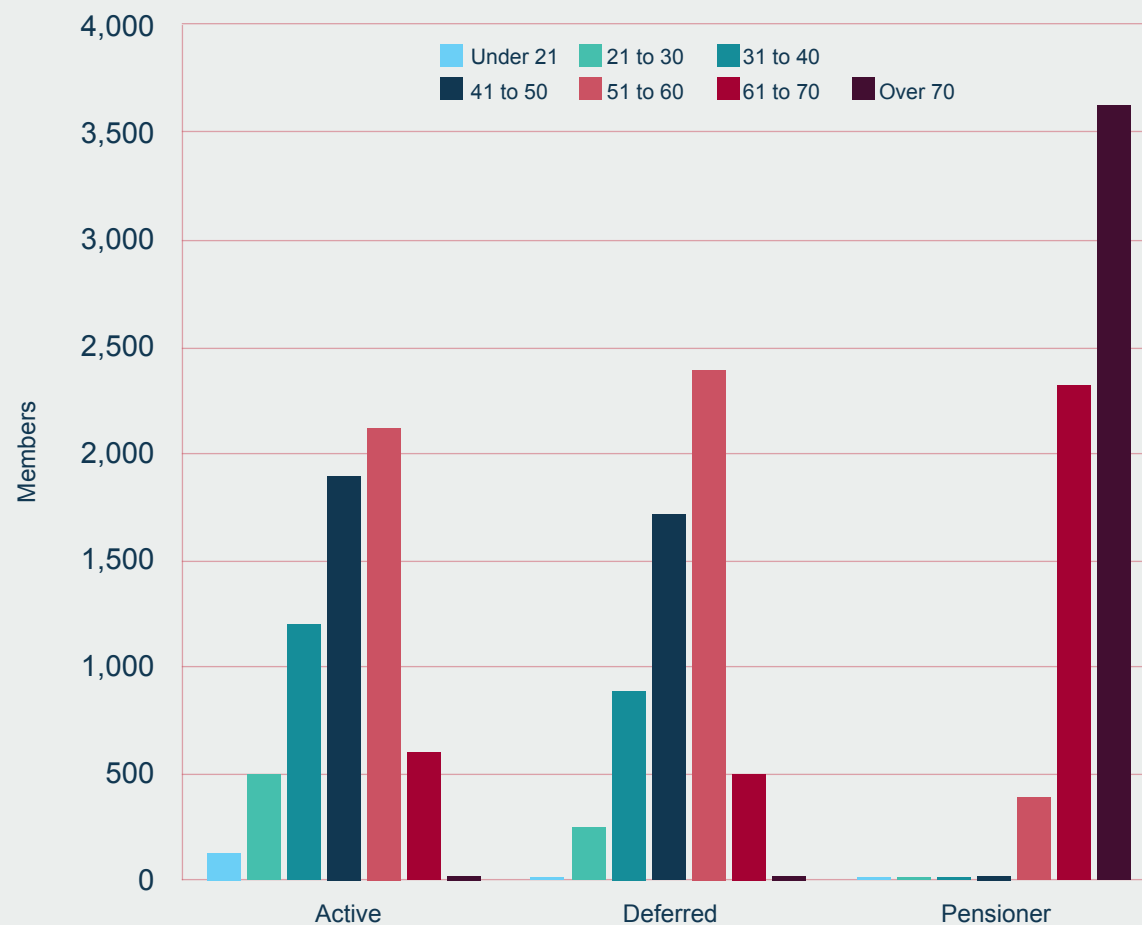
Leavers

	Total current leavers	Received*	Pending**
Havering Pension Fund	391	180	211

* Received from employer and due to be worked by LPPA in line with SLA

** Awaiting information from employer

Casework Performance Against SLA

A+

Committed to excellence

Havering Pension Fund performance - all cases

---- **Target**   The quarterly SLA performance was 100%

Performance

Month	Value
Jul 19	99.7%
Aug 19	99.7%
Sep 19	100%
Oct 19	99.2%
Nov 19	100%
Dec 19	100%
Jan 20	100%
Feb 20	99.6%
Mar 20	100%
Apr 20	100%
May 20	100%
Jun 20	100%

Casework Performance Against SLA

A+

Committed to excellence

Quarterly performance standard - Q1

■ Q1   ■ Target (98%)

	Q1 Total Processed	92%	93%	94%	95%	96%	97%	98%	99%	100%
Admissions	305									100%
Transfer in	111									100%
Transfer out	83									100%
Estimate - Individual	86									100%
Deferred benefits	270									100%
Deaths	129									100%
Retirements (immediate)	42									100%
Retirements (deferred)	55									100%
Refunds	191									100%
Estimates - Employer	43									100%
Correspondance	84									100%
Aggregation	182									100%
Other	703									100%

Elapsed Times (member experience)

Doing the right thing

Elapsed Days by Quarter

■ Q2 19/20　■ Q3 19/20　■ Q4 19/20　■ Q1 20/21

Category	Q2 19/20	Q3 19/20	Q4 19/20	Q1 20/21
Admissions	7	9	30	11
Transfer In	132	125	132	107
Transfer Out	15	24	32	27
Estimate - Individual	8	16	26	6
Deferred Benefits	40	56	94	189
Deaths	57	56	105	74
Retirements (Immediate)	64	38	40	32
Retirements (Deferred)	52	73	72	84
Refunds	14	24	53	81
Estimate - Employer	2	14	9	27
Correspondence	13	24	10	2

Working days
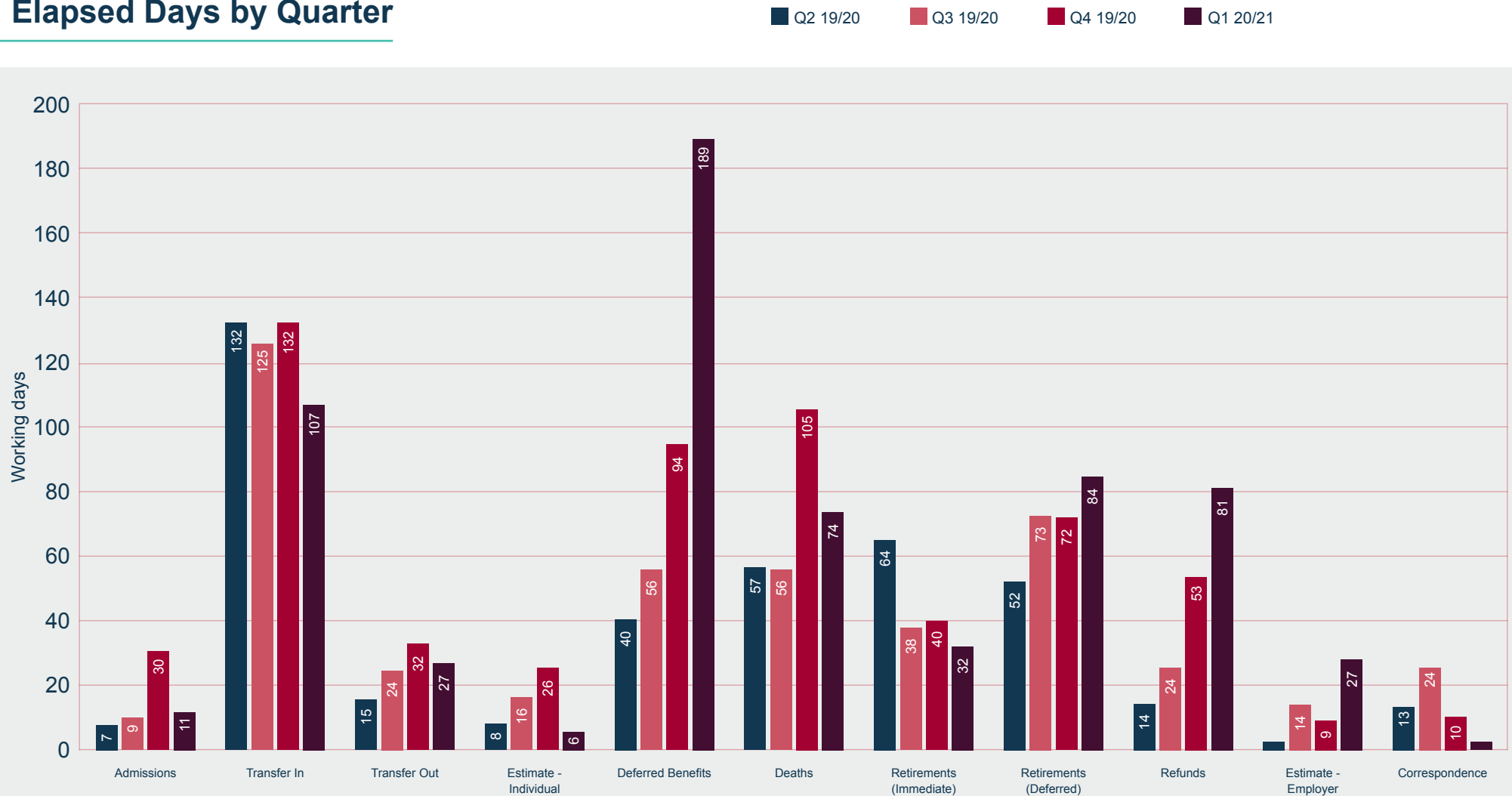
Elapsed Times (Retirements)

Doing the right thing

Deferred into payment

■ Average days in progress   ■ Average days on hold

Month	Average days in progress	Average days on hold	Total
Jul 19	16	23	39
Aug 19	28	50	78
Sep 19	19	19	38
Oct 19	19	23	42
Nov 19	24	28	52
Dec 19	56	49	105
Jan 20	47	49	96
Feb 20	31	38	69
Mar 20	14	21	35
Apr 20	26	38	64
May 20	43	51	94
Jun 20	26	57	83

Total Elapsed Days
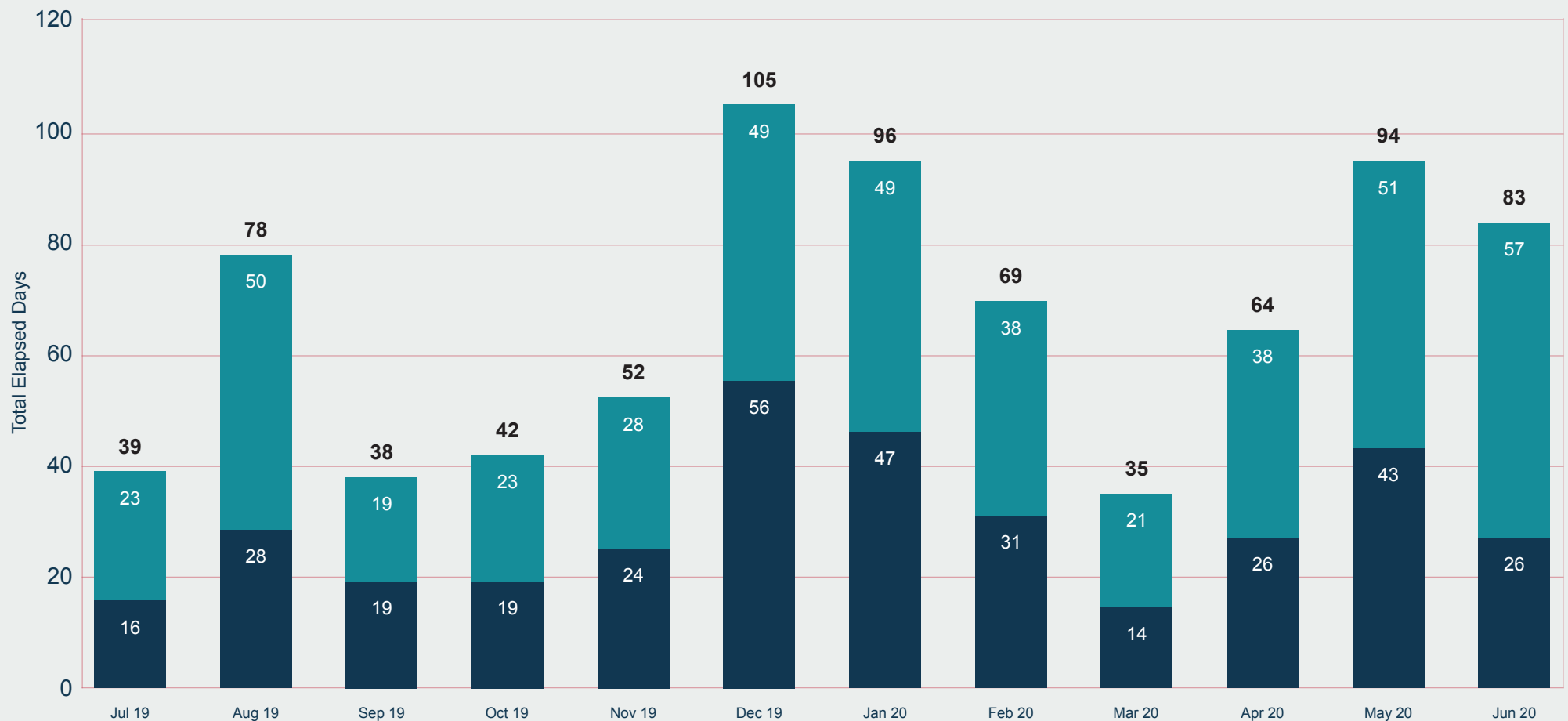
Elapsed Times (Retirements)

Active into payment

■ Average days in progress ■ Average days on hold

Doing the right thing

Month	Average days in progress	Average days on hold	Total
Jul 19	25	55	80
Aug 19	16	45	61
Sep 19	14	19	33
Oct 19	16	30	46
Nov 19	14	20	34
Dec 19	11	19	30
Jan 20	16	38	54
Feb 20	11	20	31
Mar 20	11	15	26
Apr 20	21	36	57
May 20	34	55	89
Jun 20	11	21	32

Total Elapsed Days
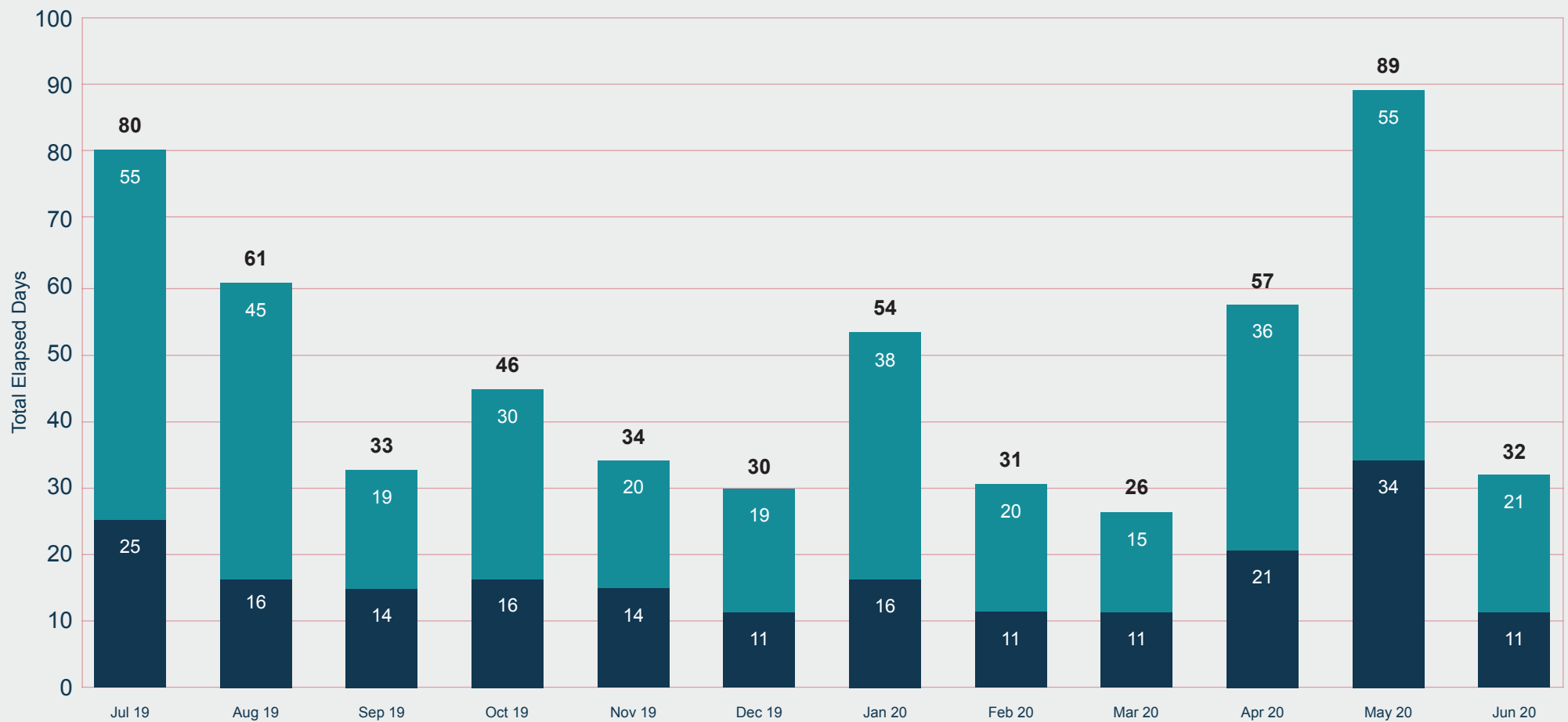
Helpdesk Performance

Committed to excellence

The Helpdesk deals with all of the updates/queries from the members for all funds within the group thus the figures supplied are at a LPPA level. The call data could not be collected between April and June due to the change in the way LPPA had to work during lockdown. LPPA implemented remote working and maintained an operational contact team but lost the management information temporarily.

Average wait time

Legend: Target hit | Target not hit | ---- Target

Month	Minutes
Jul 19	01.43
Aug 19	01.59
Sep 19	01.09
Oct 19	01.54
Nov 19	01.42
Dec 19	01.27
Jan 20	02.13
Feb 20	02.47
Mar 20	01.44

Calls answered

Legend: Target hit | Target not hit | ---- Target

Month	Answered
Jul 19	94.0%
Aug 19	94.0%
Sep 19	95.0%
Oct 19	94.0%
Nov 19	94.2%
Dec 19	95.0%
Jan 20	92.0%
Feb 20	90.9%
Mar 20	93.8%
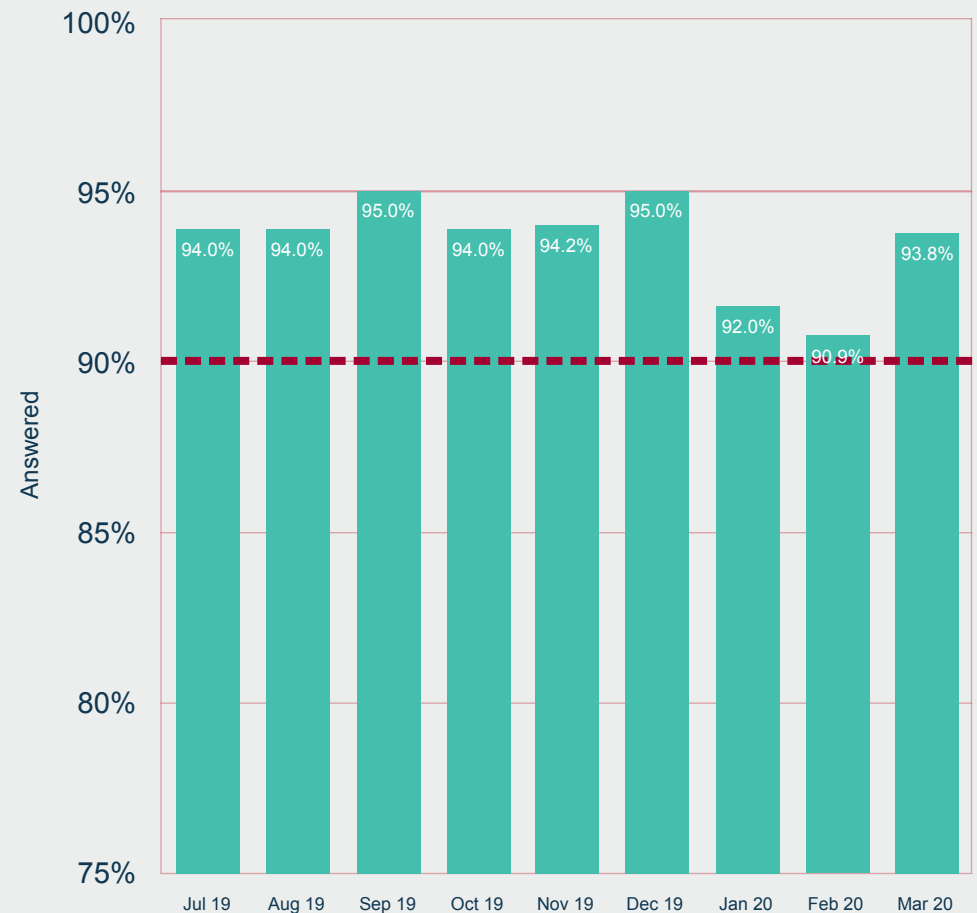
Customer Satisfaction Scores

Committed to excellence

Customer Satisfaction Scores

■ Telephone ■ E-mail ■ ■ ■ ■ Target

Customer Satisfaction Scores

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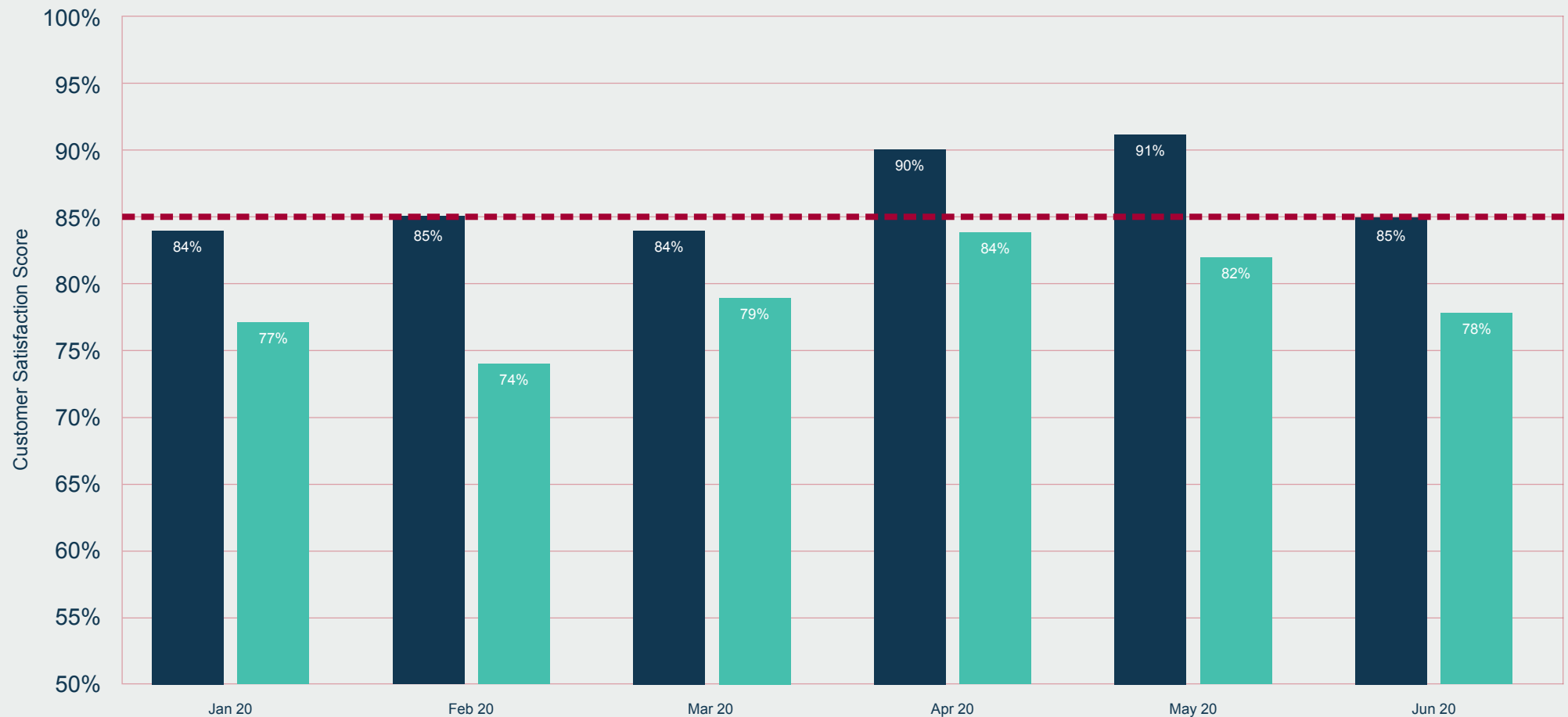
Customer Satisfaction - Retirements

■ Dissatisfied   ■ Neutral   ■ Satisfied

Month	Neutral	Satisfied
Jan 20	50%	50%
Feb 20	29%	71%
Mar 20		100%
Apr 20	25%	75%
May 20		100%
Jun 20	33%	67%
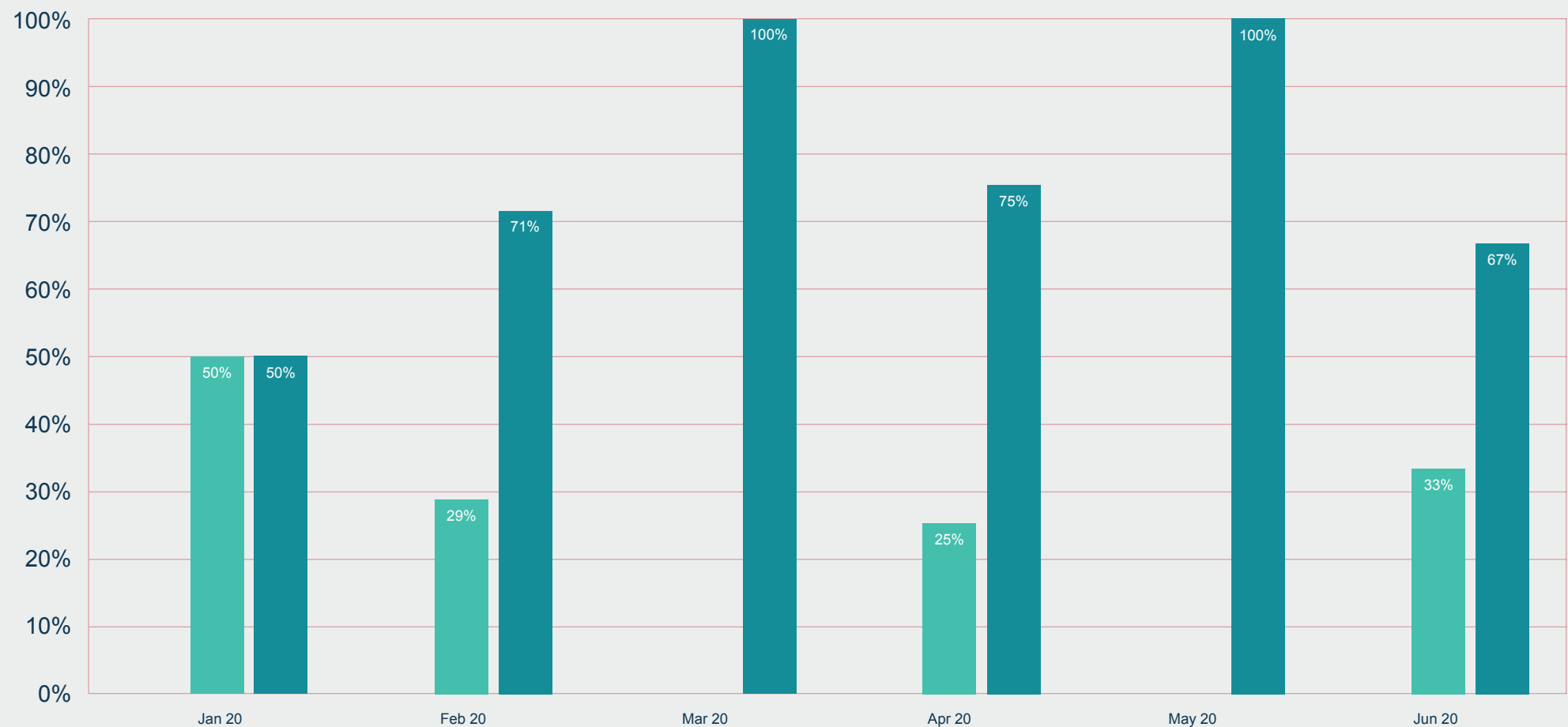
My Pension Online

My Pension Online - Members Registered
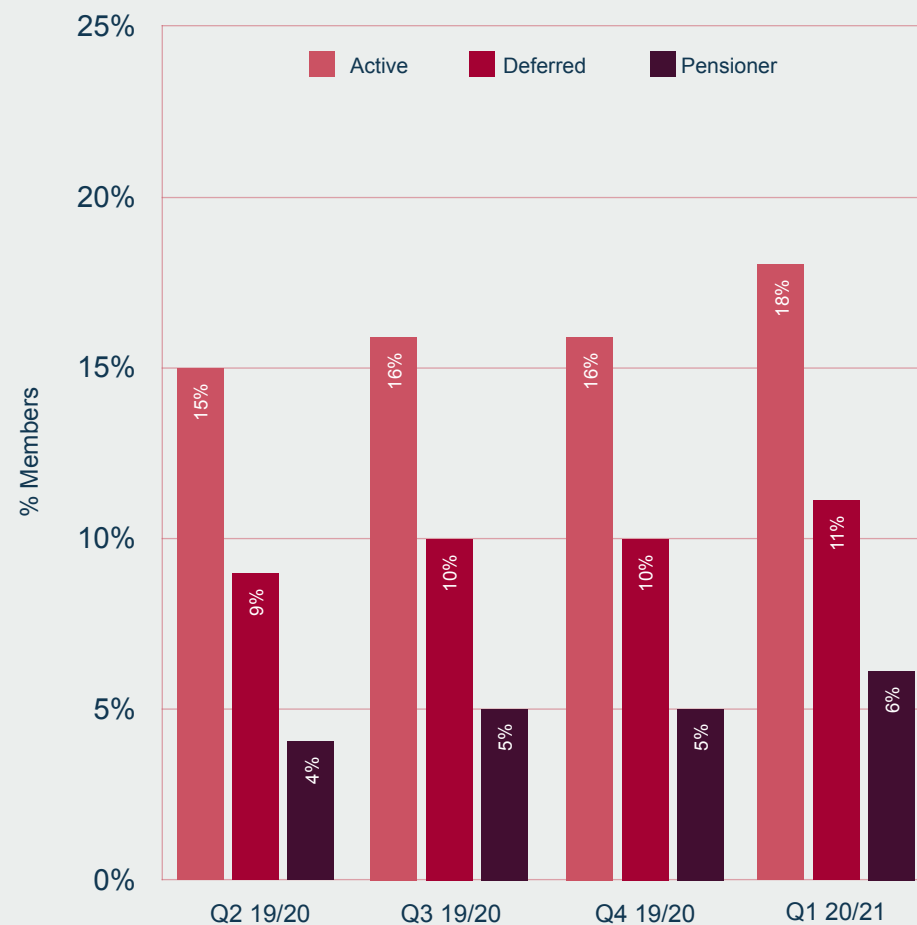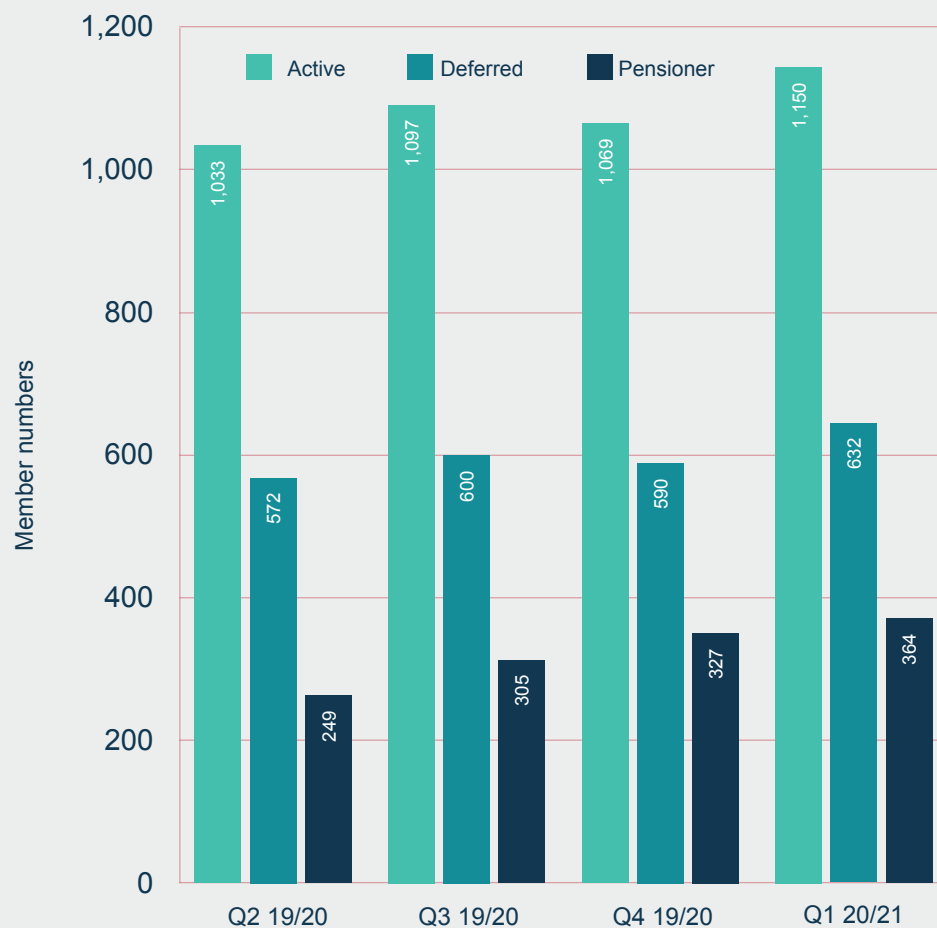
My Pension Online

My Pension Online - Age Demographic

Legend: Under 21, 21 to 30, 31 to 40, 41 to 50, 51 to 60, 61 to 70, Over 70
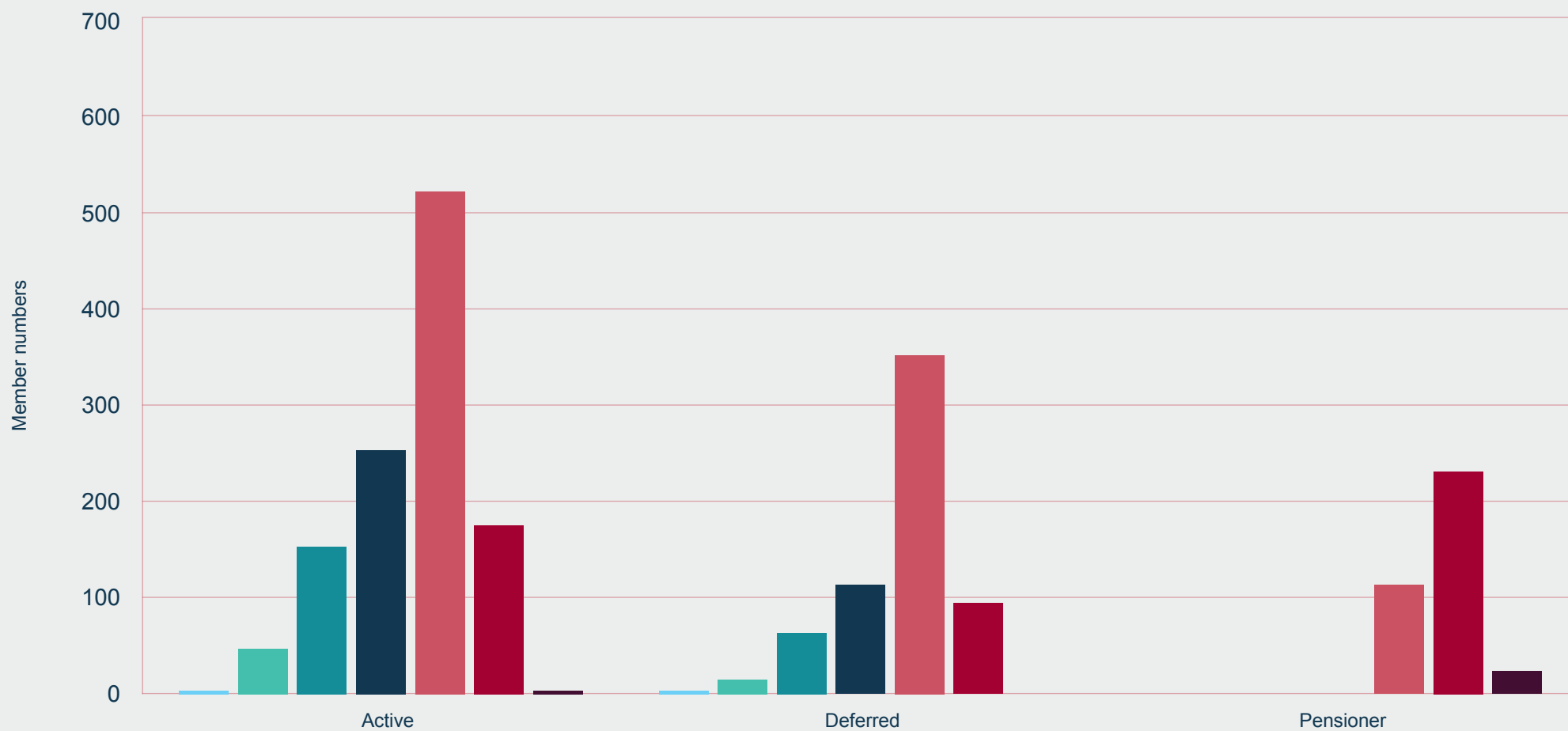
Service Improvements

Forward thinking

Delivered

Continuity of all services during Covid-19
New helpdesk telephony system 8x8 — Members now know their position in the queue when waiting - new feature - members requested this as part of their feedback - New **automated** satisfaction survey at the end of calls for members - Streamlined IVR options to route the call to the right person quicker - Speech analytics
Enhanced KPIs to improve member data and elapsed times
Head of Engagement & Communications and Member Experience Manager (New Roles)

Scheduled

New member websites
Bereavement satisfaction survey
Improved address tracing
Improved mortality screening
Improved email handling with associated SLA's

Member Contact Data

Forward thinking

E-mail Addresses

	Q2 - 2019-20	Q3 - 2019-20	Q4 - 2019-20	Q1 - Jun '20
Active Contributors	46%	47%	45%	45%
Deferred Beneficiaries*	28%	28%	33%	29%
Pensioner and Dependants	16%	17%	18%	18%

*Deferred Beneficiaries also include Frozen Refund members

E-Communications Opt-outs

	Q2 - 2019-20	Q3 - 2019-20	Q4 - 2019-20	Q1 - Jun '20
Active Contributors	-	104 (1.51%)	100 (1.53%)	93 (1.45%)
Deferred Beneficiaries*	-	94 (1.28%)	101 (1.48%)	104 (1.51%)
Pensioner and Dependants	-	44 (5.26%)	47 (5.42%)	51 (5.76%)

*Deferred Beneficiaries also include Frozen Refund members
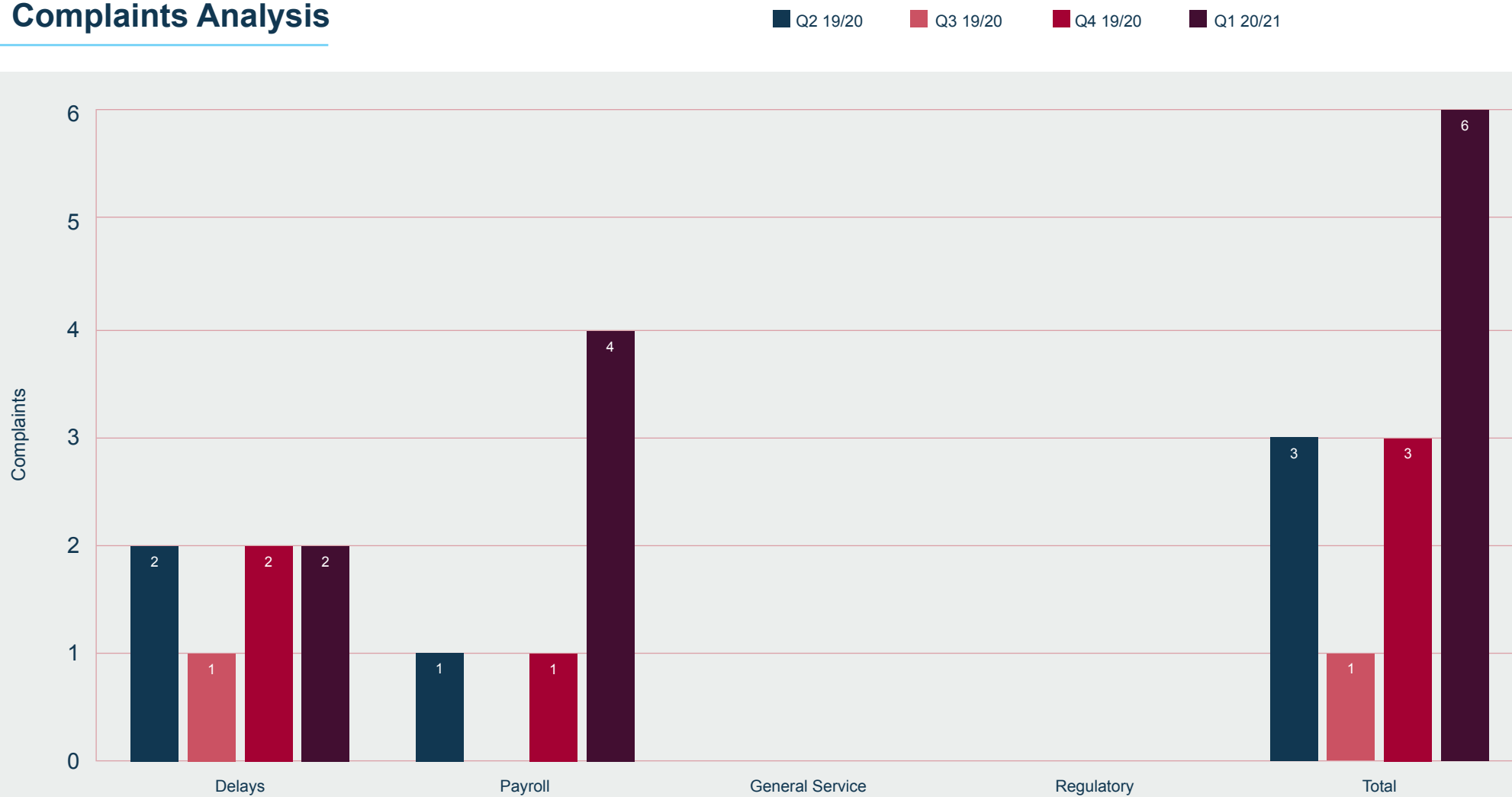
Member Contact Data

Forward thinking

Telephone Numbers

	Q2 - 2019-20	Q3 - 2019-20	Q4 - 2019-20	Q1 - Jun '20
Active	-	-	1,227 (18.79%)	1,201 (18.75%)
Deferred	-	-	1,117 (16.34%)	930 (13.54%)
Pensioner	-	-	1,007 (116.15%)	1,017 (114.79%)

Complaints

Committed to excellence

Complaints Analysis

Legend: Q2 19/20, Q3 19/20, Q4 19/20, Q1 20/21

Data Quality (TPR scores)

Doing the right thing

Common Data Fails

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	1	6	46
Surname	0	0	0
Forename / Initials	0	0	0
Sex	0	0	0
DOB	0	0	0
Date started pensionable service / Policy / Contributions	0	0	1
Membership status	0	0	0
Last event status	0	0	0
Address	2	164	15
Postcode	17	460	160
Total fails	20	630	222
Individual fails	17	460	160
Total members	6,529	6,835	867
Accuracy rate	99.7%	93.3%	81.5%

Total accuracy rate			96.5%

Data Quality (TPR scores)

Doing the right thing

Conditional Data Fails

Data Item	Fails
Divorce Records	0
Transfer In	12
AVC's/Additional Contributions	0
Deferred Benefits	0
Trances (DB)	490
Gross Pension (Pensioners)	0
Trances (Pensioners)	34
Gross Pension (Dependants)	2
Trances (Dependants)	0
Date of Leaving	5
Date Joined Scheme	1
Employer Details	2
Salary	204
Crystallisation	40
Annual Allowance	13
LTA Factors	0
Date Contracted Out	52
Pre-88 GMP	172
Post-88 GMP	477
Total Fails	1,504
Individual Fails	1,055
Total Members	14,159
Total Accuracy Rate	92.6%

Common Vs Conditional Accuracy Rate

Legend: Common, Conditional

Y-axis: Accuracy Rate (88% – 100%)
X-axis: Jul 19, Aug 19, Sep 19, Oct 19, Nov 19, Dec 19, Jan 20, Feb 20, Mar 20, Apr 20, May 20, Jun 20

Glossary of Terms

Working together
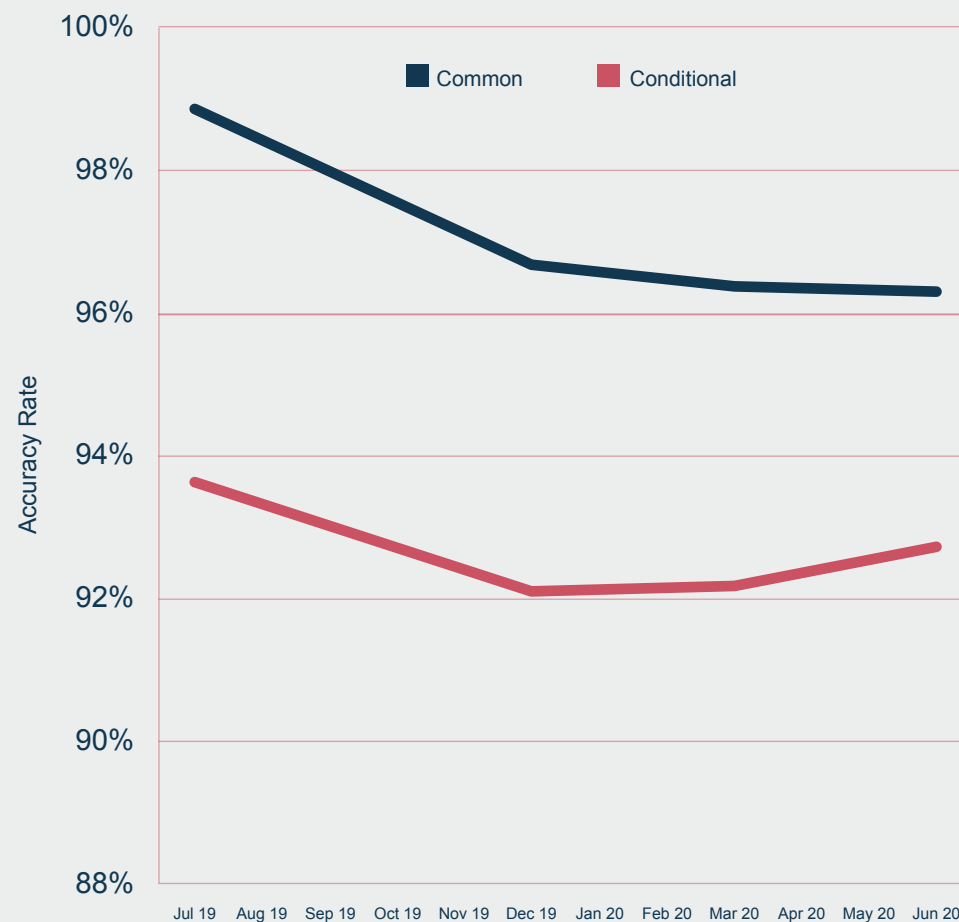
Definitions

Page 4

Total Fund Membership

The total fund membership is the number of records held on the pensions administration system with a liability to the pension fund.

Current age demographic

The age demographic of the membership is split across three status's:

Active members – the age demographic of the members currently contributing.

Deferred members – the age demographic of the members who hold a deferred benefit record in the fund.

Pensioner members – the age demographic of pensioner and dependents who are currently in receipt of a pension.

Page 6

Casework Performance Against SLA

The SLA is measured from the point at which all information is made available to LPPA to complete the process. Each work type has a defined time allocation and the SLA performance is measured as a % of cases (for which all information is available) have been completed within that timescale.

Page 8

Elapsed Times

Elapsed days represent the total number of working days between the time that the case was set up to when it was completed in our case management system.

Page 11

Helpdesk Performance

Average wait time is the time taken from connection to speaking to a member of the Helpdesk. This includes time taken listening to any messages.

The percentage of calls answered does not include any calls that hang up prior to speaking to a member of the team,

Page 12

Customer Satisfaction Scores

The Helpdesk/E-mail satisfaction score is the percentage of people who completed the survey with a satisfied response.

The Retirement satisfaction score illustrates the total surveys taken, split by response Dissatisfied, Neutral or Satisfied

Page 14

My Pension Online (MPO)

The number of members who have signed up to the LPPA's "My Pension Online" member portal split by status including a total quarterly trend and a percentage of membership quarterly trend.

Page 15

My Pension Online (MPO)

This section breaks down the members registered for MPO into age demographics

Page 17

Existing e-mail addresses

The % of emails held which is important as LPPA utilise email as a method of communication where possible.

E-Communications Opt-outs

The % of members who have chosen not to receive e-communications.

Page 18

Telephone

The % of telephone numbers held which is important as LPPA utilise the telephone as a method of communication where possible to reduce elapsed times.

Page 19

Complaints

The total number of complaints received by LPPA for the previous four quarters categorised as Delays, Payroll, General Service and Regulatory (whether upheld or not).

Page 20

Common/Conditional Data Fails

The Pension Regulator requires administrators to keep members data up to date to ensure benefits are accurately paid. Data is split into common (about the individual) and conditional (about the pension). Both aspects are measured as number of members with 1 or more error / membership).