

LPP

Local Pensions Partnership
Administration



Havering Pension Fund

Quarterly &

1st January – 31st March 2021

Annual

1st April 2020 – 31st March 2021

Administration Report

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Key



Quarterly Figures



Annual Figures



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.

Page 9

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.

Page 10-13

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 'My Pension Online' 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).

Page 14-17

Elapsed Times

Elapsed days represent the total number of working days between the case being set up, and when it was completed by LPPA.

Page 18-21

Helpdesk Performance

Average wait time measures the time taken from the caller being placed into the queue, to them speaking with a Helpdesk adviser.

The percentage of calls answered does not include calls that are abandoned by the caller where the wait time is less than 2 minutes.

From July 2020, the average wait time is Client specific (prior to this, it was measured for All Clients). The Annual Calls answered performance figures are not Client specific (as we are unable to measure abandoned calls by Client).

Page 22-24

Customer Satisfaction Scores

The Helpdesk satisfaction scores (telephone, email and retirement) are the percentage of people who completed the survey with a satisfied (green) or neutral (amber) response. The Retirement satisfaction score illustrates the total surveys taken, split by response of Dissatisfied or Satisfied.

Page 26

My Pension Online (MPO)

The number and % of Members who have signed up to "My Pension Online" (online Member portal), including a quarterly view and a comparison with the overall LPPA sign up rate (all Members).

Page 27

My Pension Online (MPO)

The number of Members that are registered for My Pension Online, split by Member status and age profile.

Page 31-33

Telephone Numbers

The number and % of telephone numbers held by Member status (this is important as LPPA use telephone contact details where possible to reduce elapsed times).

Existing e-mail addresses

The number and % of emails held by Member status (this is important as LPPA utilise email as the preferred method of written communication).

E-Communications Opt-outs

The number and % of Members who have chosen not to receive email communications.

Page 38-40

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.

The TPR (The Pension Regulator) data scores were originally collected on a quarterly basis, but from June 2020 both have been collected monthly.

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.

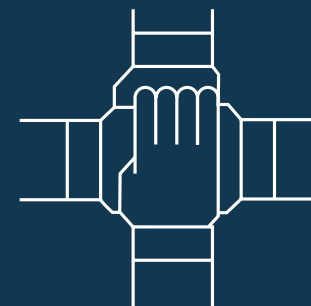
Within LPPA, our values play a fundamental role in guiding our behaviour as we grow our pensions services business and share the benefits with our Clients.



Annual Plan 2020/21

✓ COMPLETED  DUE

	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				✓	✓				✓			✓



Working Together

Fund Membership

Key



Quarterly Figures

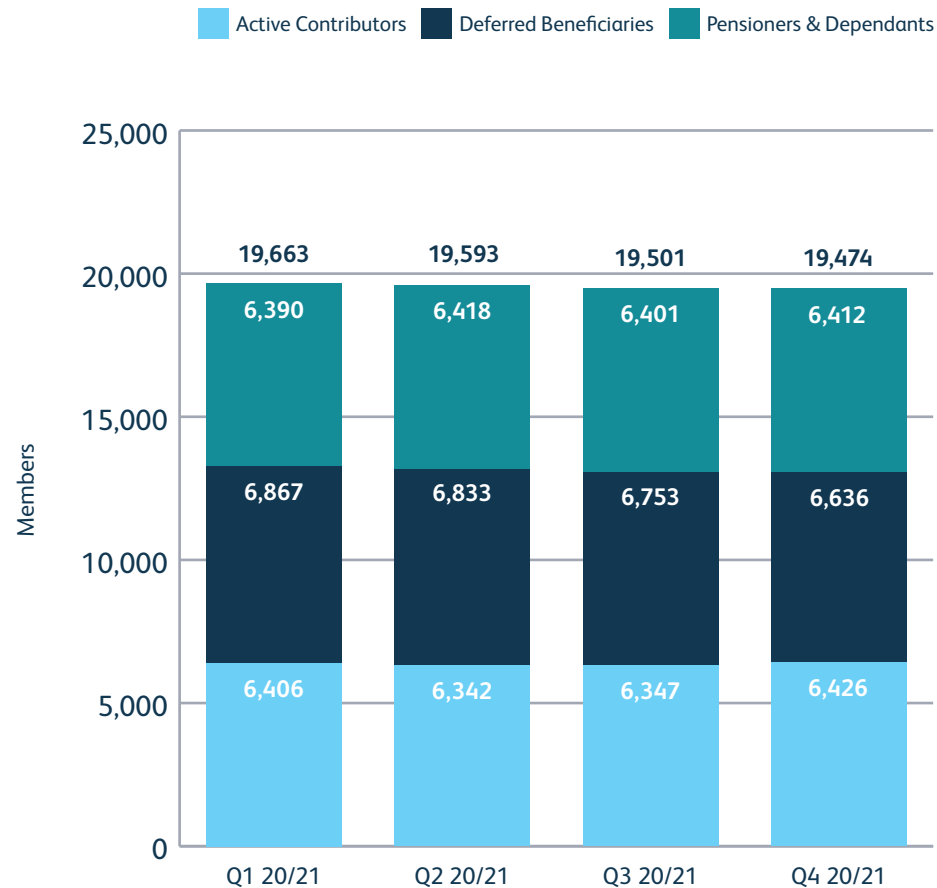


Annual Figures

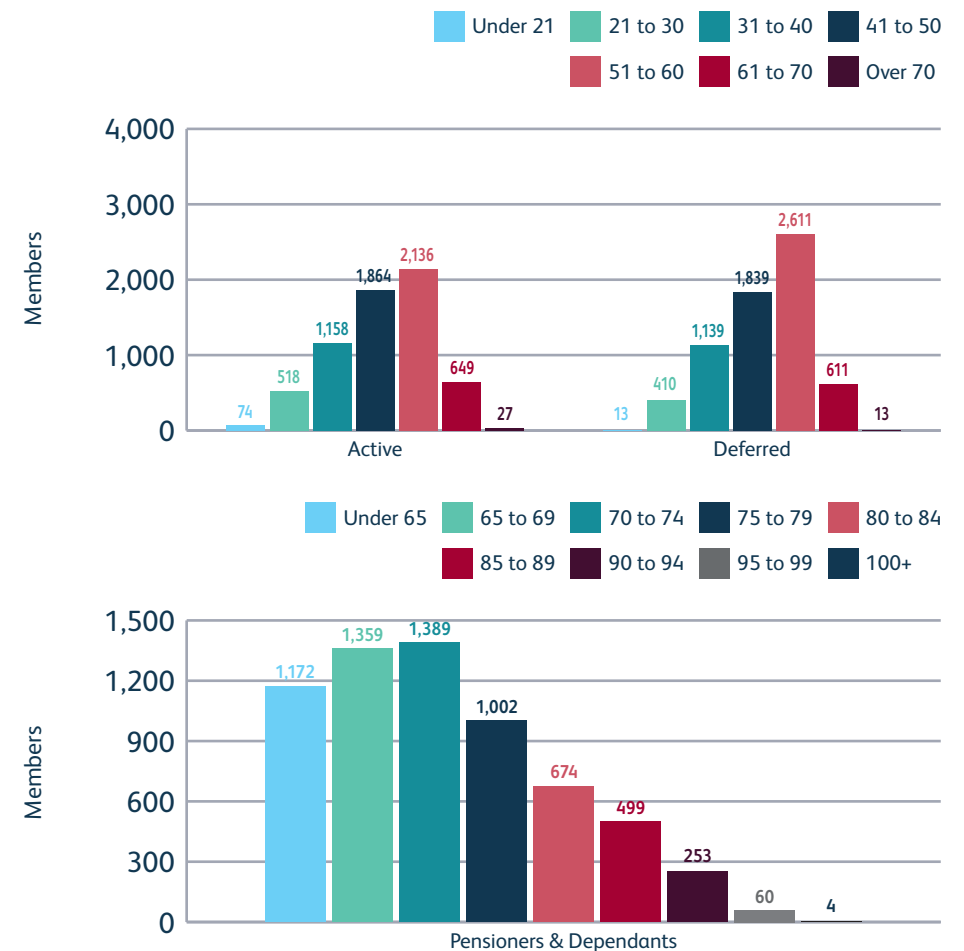
Fund Membership



ANNUAL TOTAL FUND MEMBERSHIP



QUARTERLY CURRENT AGE DEMOGRAPHIC





Committed to Excellence

Casework Performance Against SLA

Key



Quarterly Figures



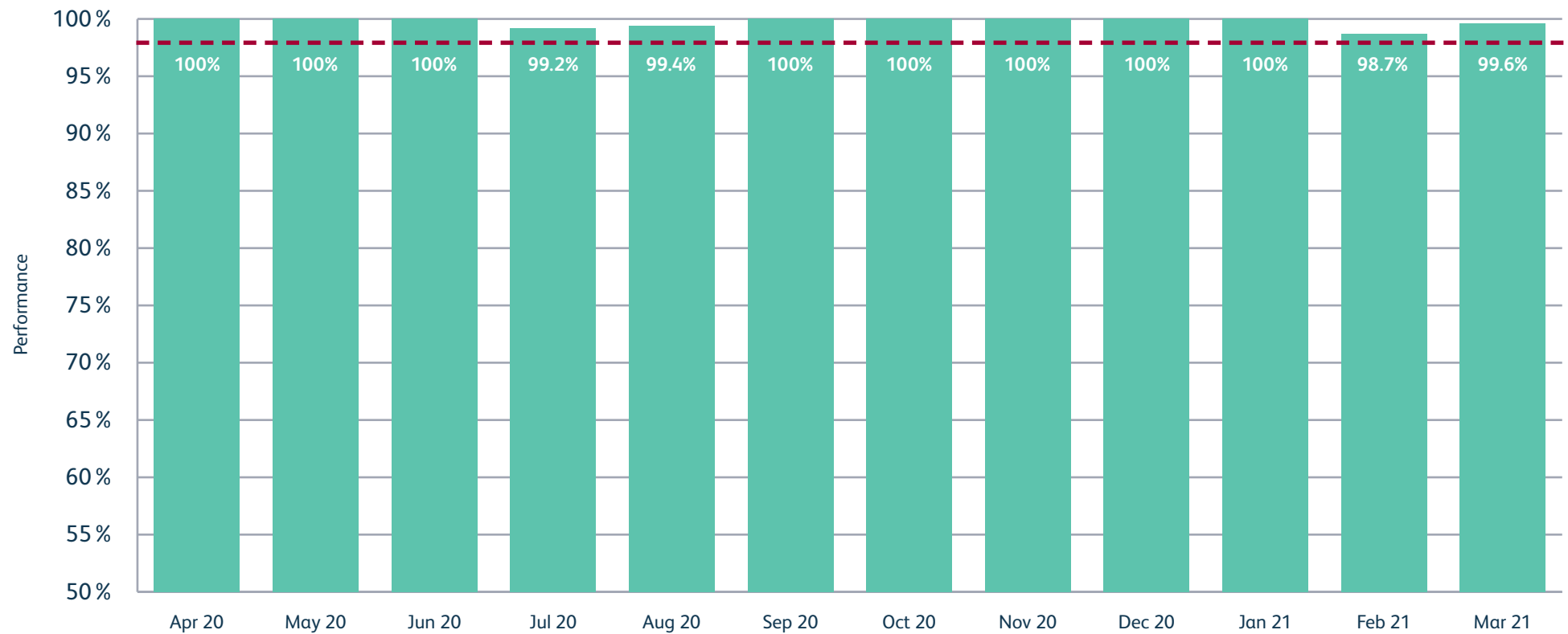
Annual Figures

ANNUAL

Casework Performance Against SLA

ANNUAL PERFORMANCE - ALL CASES

--- Target (98%) The quarterly SLA performance was 99.43% • The annual SLA performance was 99.78%





Casework Performance Against SLA

QUARTERLY PERFORMANCE STANDARD

■ Target

	SLA target (working days)	Total Processed	92%	93%	94%	95%	96%	97%	98%	99%	100%
New starters	3	218									100%
Transfer In	4	65									100%
Transfer Out	5	68									100%
Estimate – Individual	5	86									100%
Deferred Benefits	4	98									100%
Deaths	10	161							98.1%		
Retirements (immediate)	5	46									100%
Retirements (deferred)	5	80									100%
Refunds	4	61									100%
Estimates – Employer	5	15									100%
Correspondence	5	72							98.6%		
Aggregation	30	141									100%
Other (see Definitions – page 3)		297							98.7%		

Casework Performance Against SLA

ANNUAL PERFORMANCE STANDARD

■ Target

	SLA target (working days)	Total Processed	92%	93%	94%	95%	96%	97%	98%	99%	100%
New starters	3	977									100%
Transfer In	4	326									100%
Transfer Out	5	327									99.7%
Estimate – Individual	5	351									99.7%
Deferred Benefits	4	726									100%
Deaths	10	530									99.1%
Retirements (immediate)	5	209									100%
Retirements (deferred)	5	320									100%
Refunds	4	443									99.8%
Estimates – Employer	5	101									100%
Correspondence	5	310									99.4%
Aggregation	30	575									100%
Other (see Definitions – page 3)		1,639									99.7%



Casework Performance Against SLA

ONGOING CASEWORK AT THE END OF THE REPORTING QUARTER

	Brought Forward at 01/01/21	Completed	Received	Outstanding as of 31/03/21
New Starters	30	218	194	6
Transfer In	90	65	60	85
Transfer Out	24	68	77	33
Estimate - Individual	13	86	75	2
Deferred Benefits	62	98	103	67
Deaths	162	161	159	160
Retirements (Immediate)	33	46	50	37
Retirements (Deferred)	72	80	90	82
Refunds	19	61	59	17
Estimates - Employer	5	15	10	0
Correspondence	9	72	71	8
Aggregation	102	141	87	48
Other <i>(see Definitions – page 3)</i>	80	297	300	83
TOTALS	701	1,408	1,335	628

Casework Performance Against SLA

ONGOING CASEWORK AT THE END OF THE REPORTING YEAR

	Brought Forward at 01/04/20	Completed	Received	Outstanding as of 31/03/21
New Starters	10	977	973	6
Transfer In	146	326	265	85
Transfer Out	36	327	324	33
Estimate - Individual	25	351	328	2
Deferred Benefits	244	726	549	67
Deaths	104	530	586	160
Retirements (Immediate)	23	209	223	37
Retirements (Deferred)	79	320	323	82
Refunds	57	443	403	17
Estimates - Employer	23	101	78	0
Correspondence	36	310	282	8
Aggregation	313	575	310	48
Other (see Definitions – page 3)	658	1,639	1,064	83
TOTALS	1,754	6,834	5,708	628



Doing The Right Thing

Elapsed Times

Key



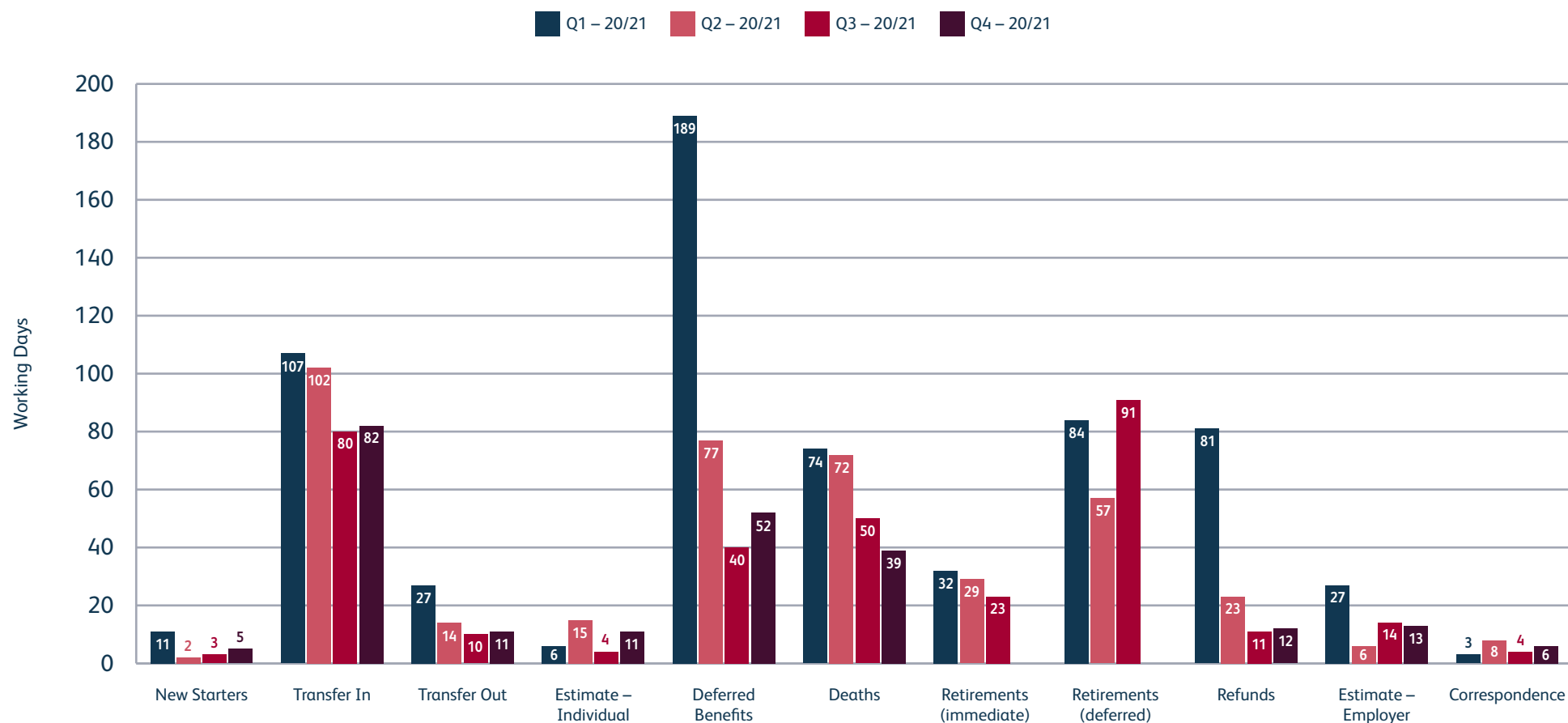
Quarterly Figures



Annual Figures

Elapsed Times

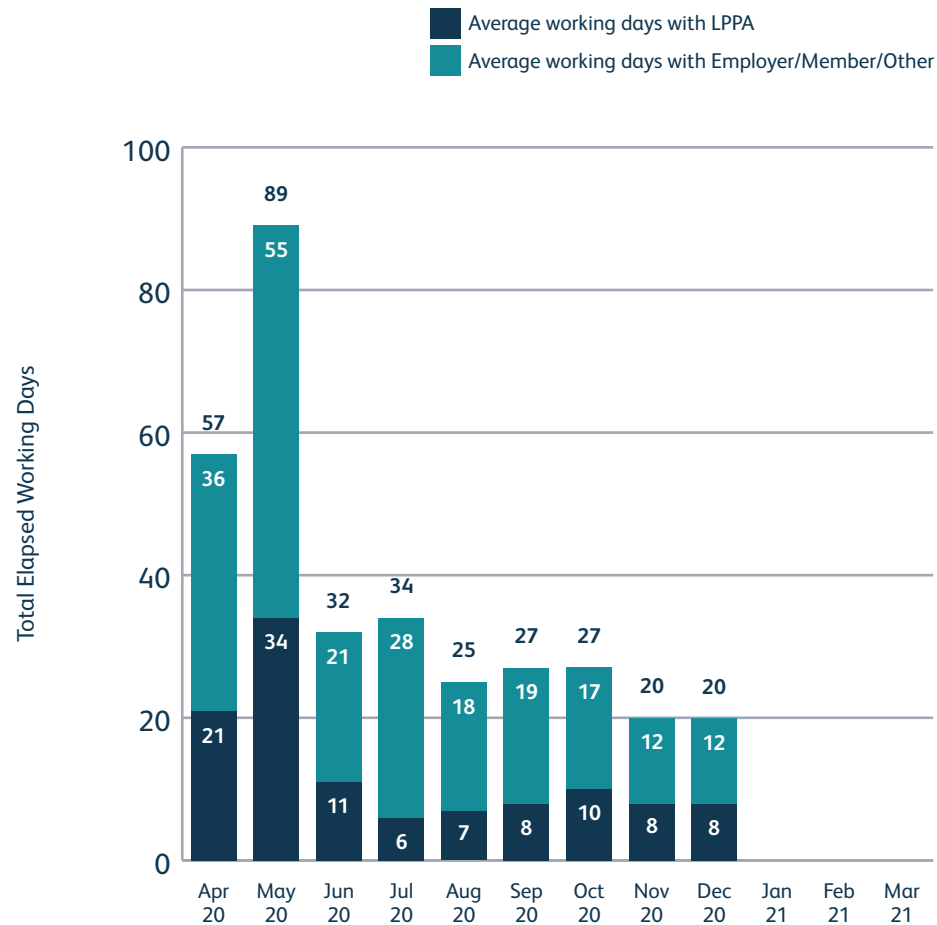
ANNUAL ELAPSED DAYS BY QUARTER



*Retirement case elapsed time is unavailable for the reporting period 20/21 quarter 4. This will be available in 21/22 quarter 1 after we have transitioned to our new workflow allocation method. This will enable us to prioritise retirement work in a more focussed way to make more payments within 1 month of retirement.

Elapsed Times (Retirements)

ANNUAL ACTIVE INTO PAYMENT



REASONS ON HOLD

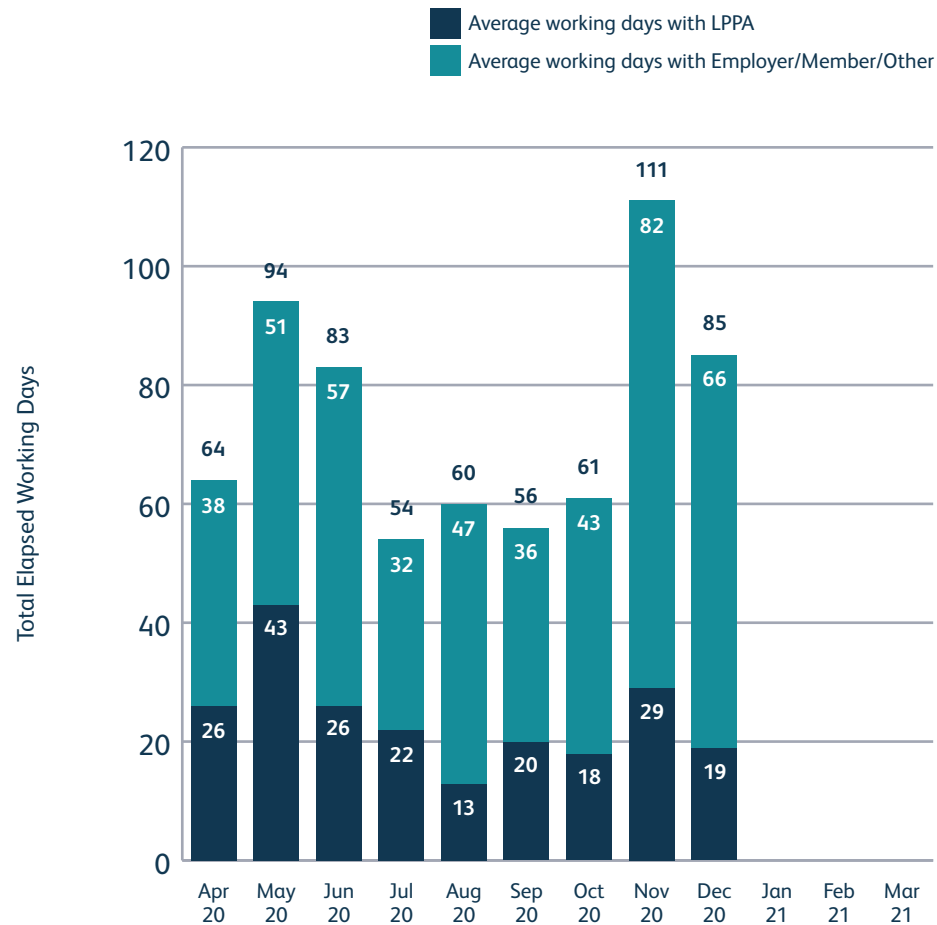
	Employer	Member	Other	Total
Apr 20	12.0	24.0	0.0	36.0
May 20	25.5	24.7	4.8	55.0
Jun 20	11.0	10.0	0.0	21.0
Jul 20	1.9	26.1	0.0	28.0
Aug 20	10.8	7.2	0.0	18.0
Sep 20	7.6	7.6	3.8	19.0
Oct 20	2.2	14.8	0.0	17.0
Nov 20	2.7	9.3	0.0	12.0
Dec 20	1.0	11.0	0.0	12.0

*Retirement case elapsed time is unavailable for the reporting period 20/21 quarter 4. This will be available in 21/22 quarter 1 after we have transitioned to our new workflow allocation method. This will enable us to prioritise retirement work in a more focussed way to make more payments within 1 month of retirement.

Elapsed Times (Retirements)

ANNUAL DEFERRED INTO PAYMENT

REASONS ON HOLD



	Employer	Member	Other	Total
Apr 20	2.9	35.1	0.0	38.0
May 20	1.5	49.5	0.0	51.0
Jun 20	1.4	53.7	1.9	57.0
Jul 20	0.7	30.2	1.1	32.0
Aug 20	2.4	44.3	0.3	47.0
Sep 20	3.4	27.8	4.8	36.0
Oct 20	1.2	28.5	13.3	43.0
Nov 20	5.2	48.6	28.2	82.0
Dec 20	15.6	50.2	0.1	65.9

*Retirement case elapsed time is unavailable for the reporting period 20/21 quarter 4. This will be available in 21/22 quarter 1 after we have transitioned to our new workflow allocation method. This will enable us to prioritise retirement work in a more focussed way to make more payments within 1 month of retirement.



Committed To Excellence

Helpdesk Performance

Key



Quarterly Figures

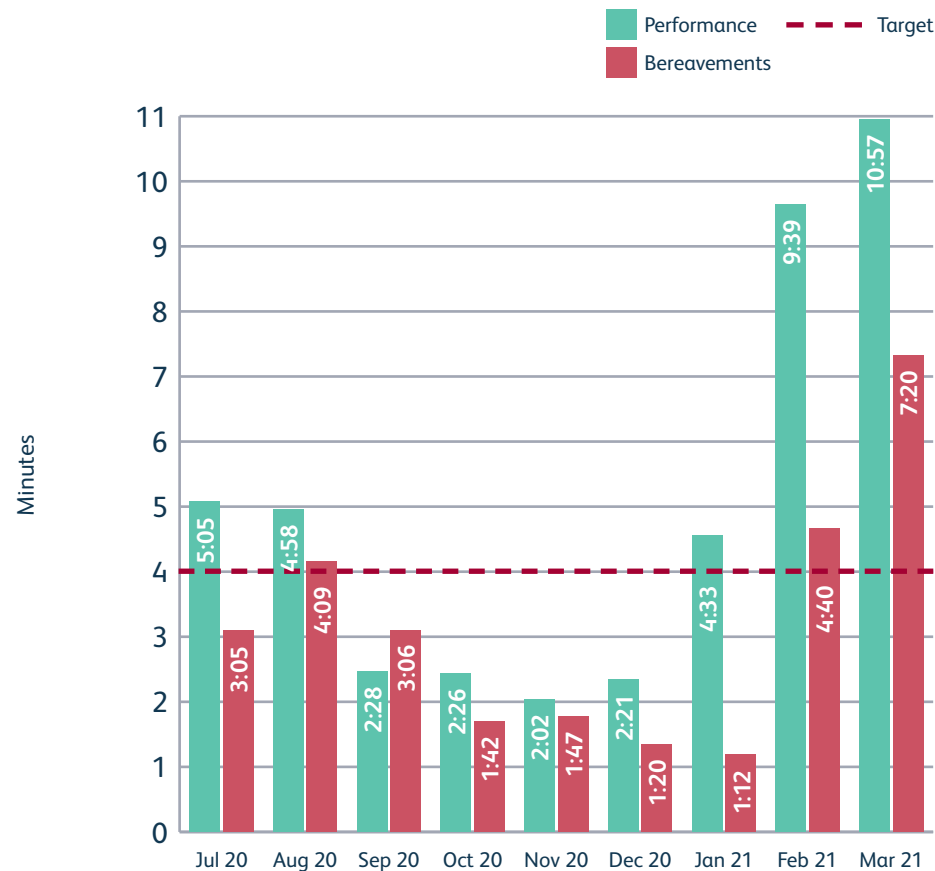


Annual Figures

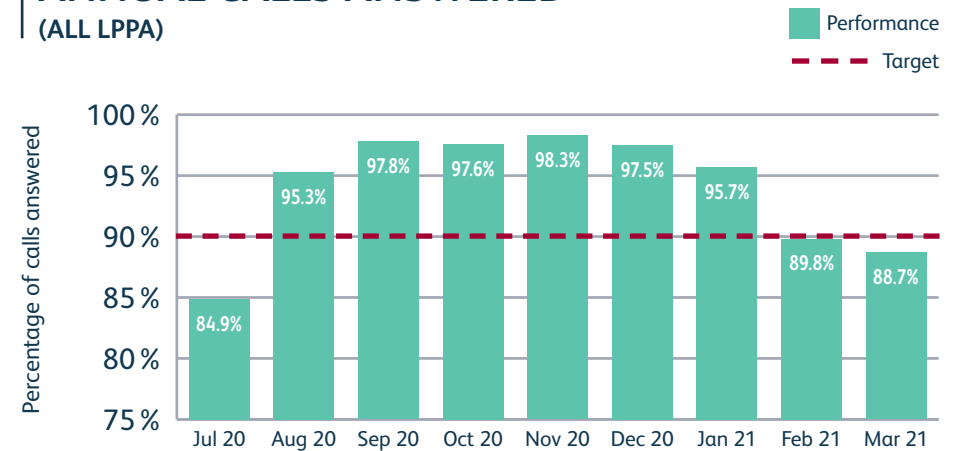
Helpdesk Performance - Calls

The Helpdesk deals with all call and e-mail enquiries from both members and employers for all funds that LPPA provide administration services for. 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.

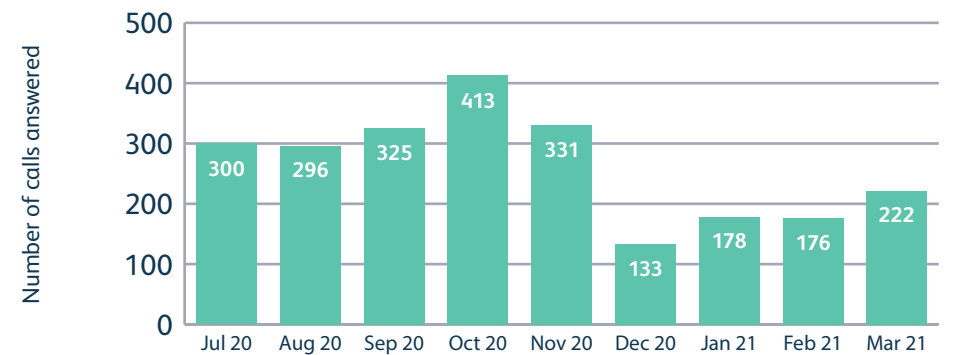
ANNUAL AVERAGE WAIT TIME



ANNUAL CALLS ANSWERED (ALL LPPA)



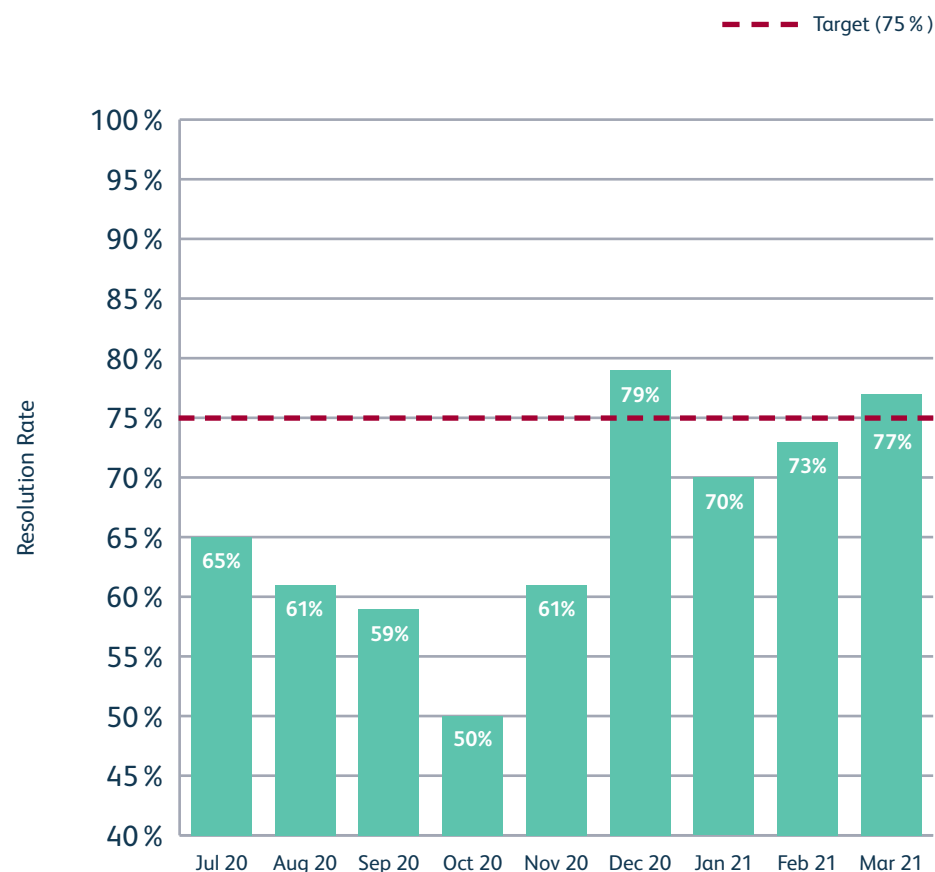
ANNUAL CALL VOLUMES



Helpdesk Performance - Calls



ANNUAL RESOLUTION RATE*



*Queries not resolved at first point of contact had a subsequent case setup. Our operations team then respond within agreed contractual time-scales.



WHAT DO MEMBERS & EMPLOYERS CALL ABOUT?

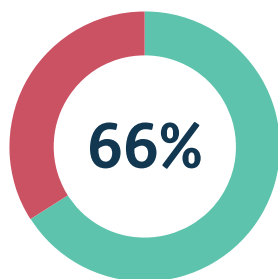
	JAN 21	FEB 21	MAR 21
Annual Benefit Statement	3	1	2
Annual Allowance	0	2	0
Additional Voluntary Contributions / Additional Pension Contributions	2	0	1
Bereavement	28	29	22
Deferred	4	4	3
Divorce	3	3	2
Estimate	17	11	11
Life Certificates	0	0	2
McCloud	0	0	0
My Pension Online	8	17	26
P60	1	2	1
Payslip	6	16	12
Pension Increase	0	0	0
Refund	9	5	5
Retirement	63	42	73
Transfer	16	13	16
Update Details	11	8	8
Other	7	23	38
TOTALS	178	176	222



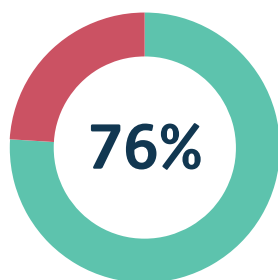
Helpdesk Performance - Emails

QUARTERLY RESOLUTION RATE* (TARGET 75%)

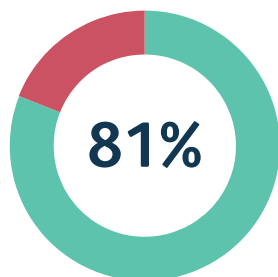
JANUARY



FEBRUARY

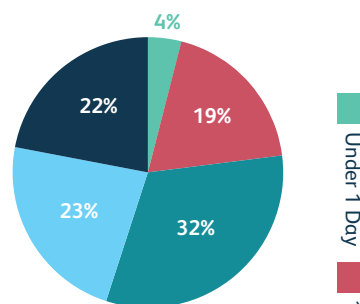


MARCH

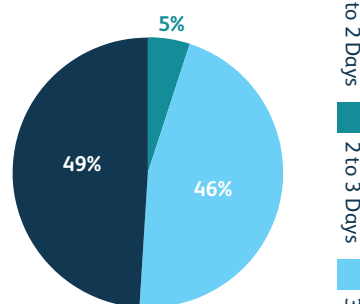


EMAIL HANDLING RATE

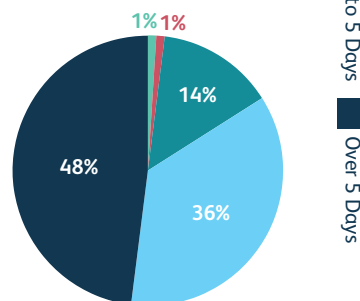
JANUARY



FEBRUARY



MARCH



WHAT DO MEMBERS & EMPLOYERS EMAIL ABOUT?

	JAN 21	FEB 21	MAR 21
Annual Benefit Statement	3	1	2
Annual Allowance	1	2	0
Additional Voluntary Contributions / Additional Pension Contributions	2	6	1
Bereavement	17	11	8
Deferred	0	0	3
Divorce	3	6	7
Estimate	15	11	14
Life Certificates	2	0	1
McCloud	0	0	0
My Pension Online	14	22	22
P60	5	0	0
Payslip	3	0	7
Pension Increase	0	0	0
Refund	5	4	2
Retirement	19	14	28
Transfer	33	50	26
Update Details	12	18	16
TOTALS	134	145	137

*Queries not resolved at first point of contact had a subsequent case setup. Our operations team then respond within agreed contractual time-scales.



Committed To Excellence

Customer Satisfaction Scores

Key



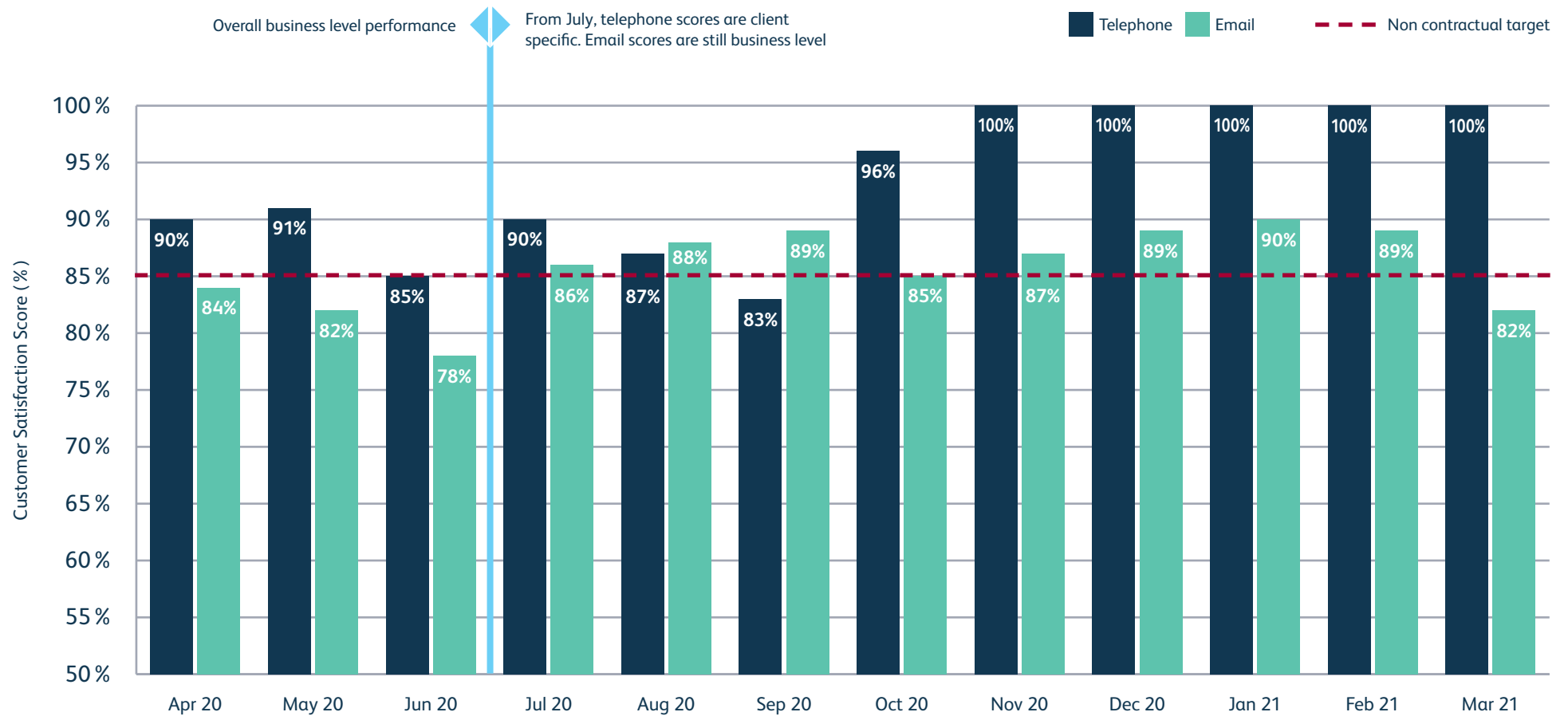
Quarterly Figures



Annual Figures

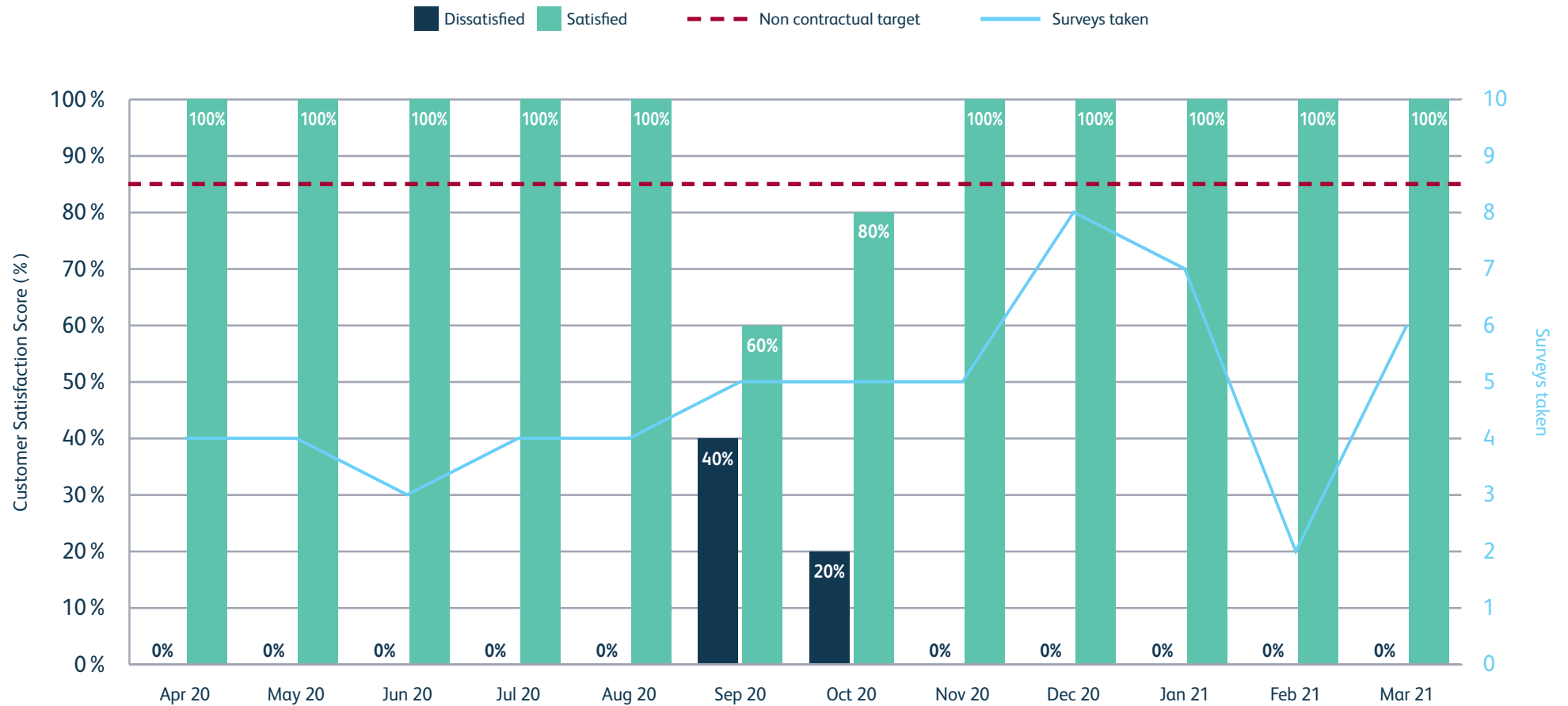
Customer Satisfaction Scores

ANNUAL HELPDESK SATISFACTION



Customer Satisfaction Scores

ANNUAL RETIREMENTS





Forward Thinking

My Pension Online (MPO)

Key

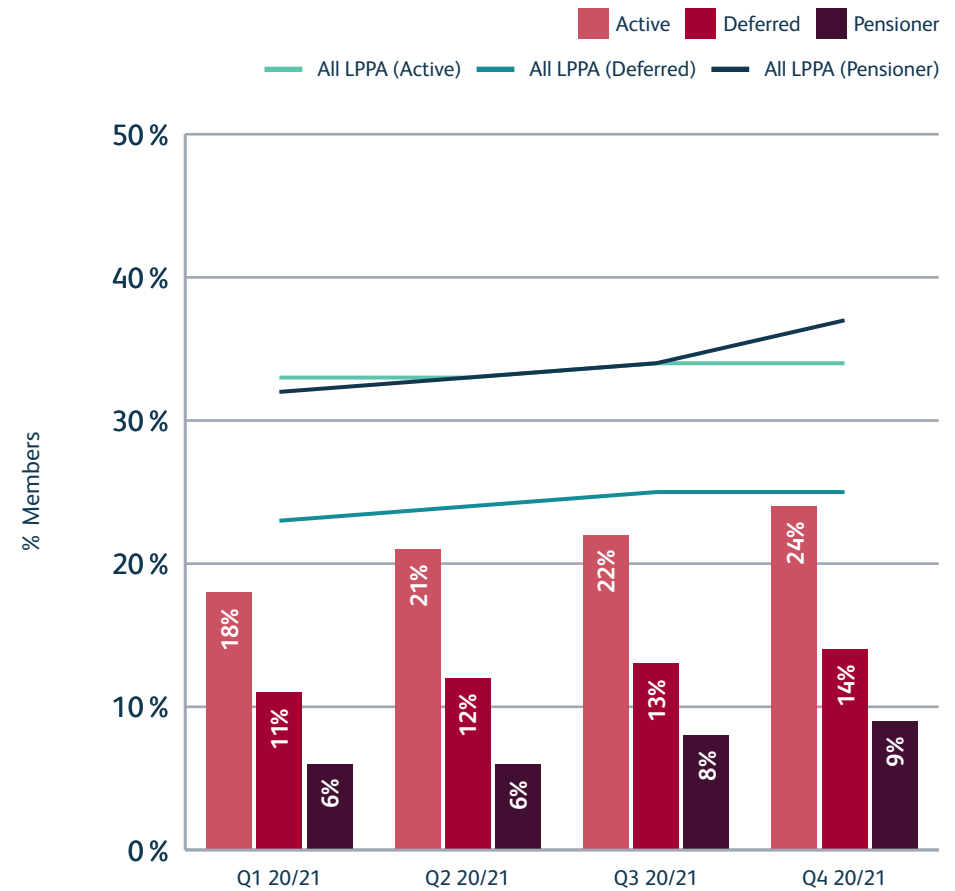
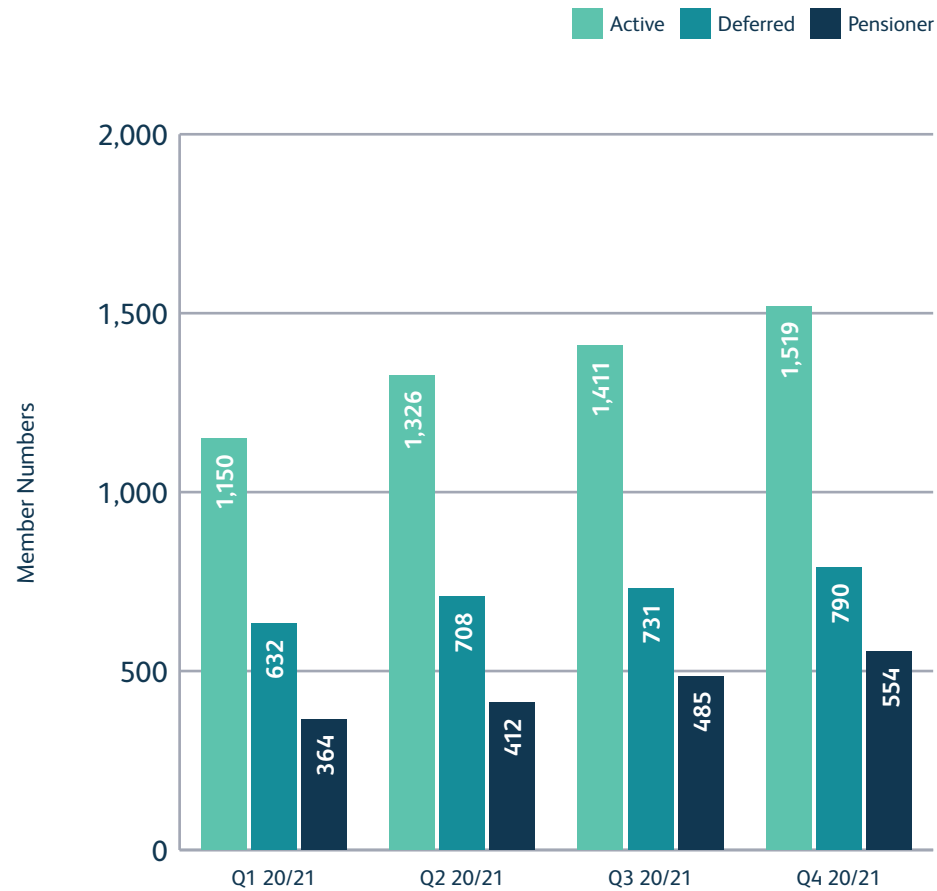


Quarterly Figures



Annual Figures

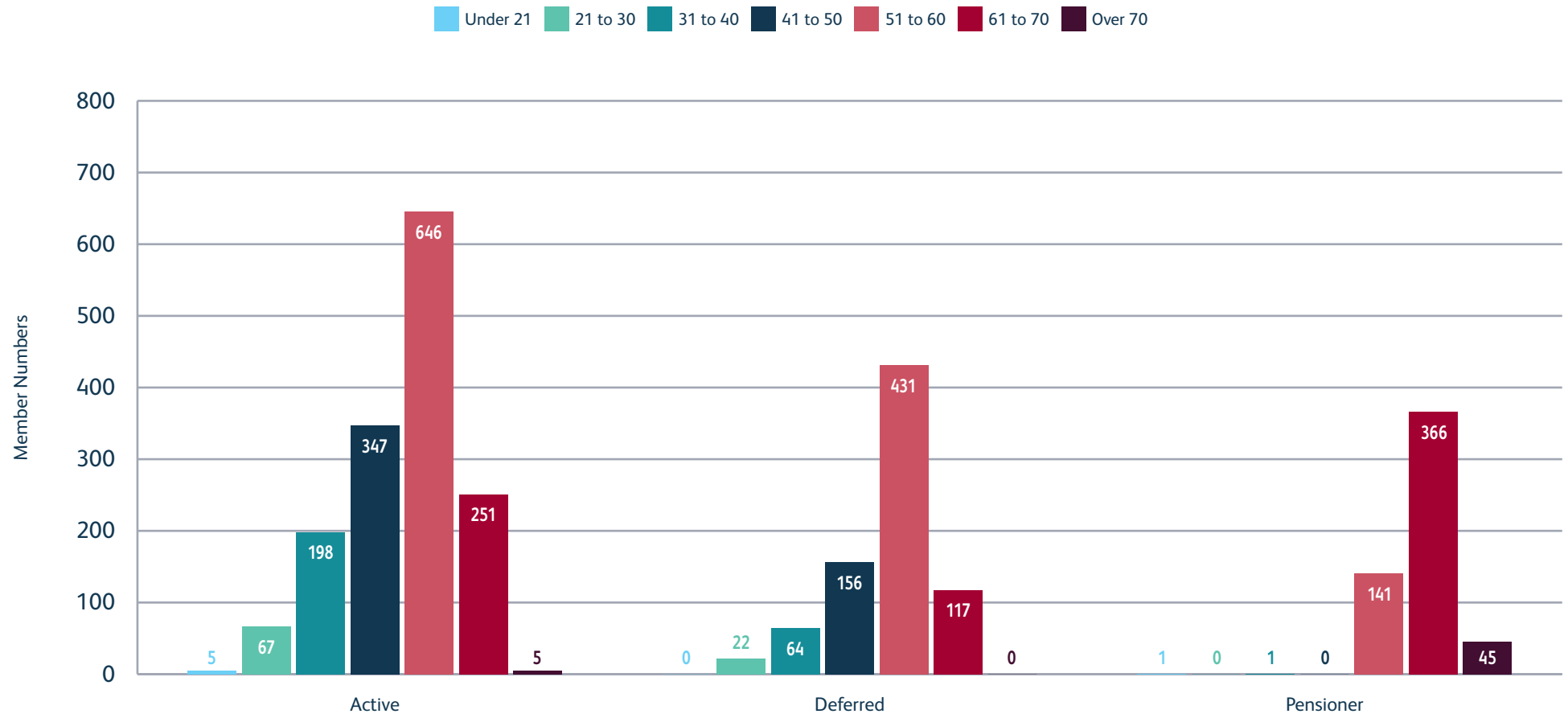
ANNUAL MEMBERS REGISTERED





My Pension Online

QUARTERLY AGE DEMOGRAPHIC





Forward Thinking

Service Improvements

Key



QUARTERLY

Quarterly Figures



ANNUAL

Annual Figures



Service Improvements

DELIVERED

1	Email campaign to 'Overseas Members', to encourage submission of a completed life certificate
2	End of Year data return activity (Employer training to clear outstanding queries / leaver forms)
3	Pensioner (Spring) Newsletter approved by Clients for MPO upload
4	'Contact LPPA' webform enhanced to allow multiple documents to be submitted
5	Populated retirement dates in the system
6	New operating model launched
7	Transfer Satisfaction survey launched

SCHEDULED

1	Changing how we prioritise retirements to improve time to payment measures
2	Focusing online Member enquiries through the Ippapensions website (secure communication channel preferences offered through LiveChat, Contact LPPA webform and My Pension Online portal), and removal of AskPensions email channel
3	Launch of Member video guide (Register your MPO account) and MPO self-service articles (How to Reset your Password, How to Update your Telephone Number, How to Nominate your Death Beneficiary) on the Ippapensions website
4	Educational videos to feature on website (Managing your Retirement Process, a Brief History of LPPA, The Value of the LGPS), and published to Clients, Employers and Members
5	Helpdesk IVR message to route MPO queries initially to the website (to review online 'help and support' resources)
6	Member pensions documents (descriptions) in MPO to be simplified to improve Members understanding
7	Pilot (potentially launch) new Member Welcome email campaign

Service Improvements

DELIVERED

1	Improved Quarterly Client Reporting pack developed (including Employer Performance reports)
2	Extended Member satisfaction surveys to 6 interactions
3	Restructured operations to create process aligned teams
4	Ring-fenced all quality checking
5	Removed manual pay calculations
6	Launched new Member and Employer facing website
7	Launched Live Chat on Ippapensions.co.uk
8	Launched enhanced bereavement process (including dedicated and prioritised Helpdesk option)
9	Implemented standard (monthly) mortality tracing and (at point of retirement) address tracing
10	Callers notified of place in call queue
11	Covid-19 impact analysis and service measures (quarterly Client pack issued)
12	Introduce new helpdesk telephony system 8x8

SCHEDULED

1	Focused improvement on elapsed times for Retirements process
2	Video assistance applied to Ippapensions.co.uk to improve Member self-service
3	Proactive Retirement help sessions & bookable appointments (through website)
4	Simplicity promise applied to all communications (letters project to review all correspondence & forms, and generate ongoing feedback from Members)
5	LiveChat and website 'Contact LPPA' forms fully utilised
6	Flexible resource and forecasting tools to predict and plan for work peaks
7	Automation and standardisation



Forward Thinking

Member Contact Data

Key



Quarterly Figures



Annual Figures

Member Contact Data

EMAIL ADDRESSES

	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21
Active Contributors	2,894 (45.18%)	2,942 (46.39%)	2,972 (46.83%)	3,134 (48.77%)
Deferred Beneficiaries	1,655 (28.95%)	1,699 (29.7%)	1,719 (30.33%)	1,750 (31.36%)
Pensioner and Dependants	1,167 (18.26%)	1,229 (19.15%)	1,344 (21%)	1,457 (22.72%)

TELEPHONE NUMBERS

	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21
Active Contributors	1,201 (18.75%)	1,182 (18.64%)	1,199 (18.89%)	1,338 (20.82%)
Deferred Beneficiaries	930 (13.54%)	962 (14.08%)	998 (14.78%)	1,088 (16.40%)
Pensioner and Dependants	1,017 (15.92%)	1,039 (16.19%)	1,101 (17.20%)	1,236 (19.28%)

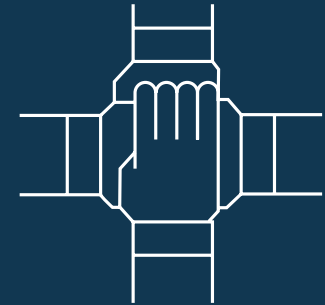
Member Contact Data

DEATH NOMINATION

	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21
Active Contributors	2,487 (38.82%)	2,481 (39.12%)	2,467 (38.87%)	2,506 (39%)

E-COMMUNICATIONS OPT-OUT

	Q1 – 20/21	Q2 – 20/21	Q3 – 20/21	Q4 – 20/21
Active Contributors	93 (1.45%)	91 (1.43%)	87 (1.37%)	85 (1.32%)
Deferred Beneficiaries	104 (1.51%)	101 (1.48%)	95 (1.41%)	94 (1.42%)
Pensioner and Dependants	51 (0.80%)	56 (0.87%)	64 (1.00%)	67 (1.04%)



Working Together

Engagement Activity

Key



Quarterly Figures



Annual Figures



Engagement Activity

EMPLOYERS

Date	Employer	Activity	Number in attendance
22 Jan 2021	SLM Fitness & Health/SLM Community Leisure	Virtual Visit	1
11 Feb 2021	Concordia Academy	Virtual Visit	1
18 Feb 2021	Drapers' Multi Academy Trust	Training	2
18 Feb 2021	Havering	Training	4
18 Feb 2021	SLM Everyone Active	Training	2
18 Feb 2021	The Coopers' Company and Coborn School	Training	1
24 Feb 2021	Unity Schools Partnership	Training	3
04 Mar 2021	Reach2 Academy Trust	Training	1
04 Mar 2021	The Coopers Company & Coborn School	Training	1
04 Mar 2021	SLM Everyone Active	Training	1
15 Mar 2021	LIFE Education Trust	Training	1
29 Mar 2021	OCL Oasis Academy Pinewood Oasis Academy Silvertown	Training	2

EMAILS – EMPLOYERS

Date	Message / Campaign	Call to Action
28 Jan 2021	Employer Ill health Webinar Invitation	Book training
03 Feb 2021	Submitting End of Year Queries	Submitting End of Year Queries
04 Feb 2021	Ill Health Campaign	Book on training
05 Feb 2021	McCloud Data Collection	Information
12 Feb 2021	Scheme Essentials Promotion	Promote member presentations
12 Feb 2021	Updated Process - Opt Out Notification	New process to follow
15 Feb 2021	Exit Cap (Update)	Information
16 Feb 2021	Bereavement for Employers	New process

EMAILS – EMPLOYERS continued...

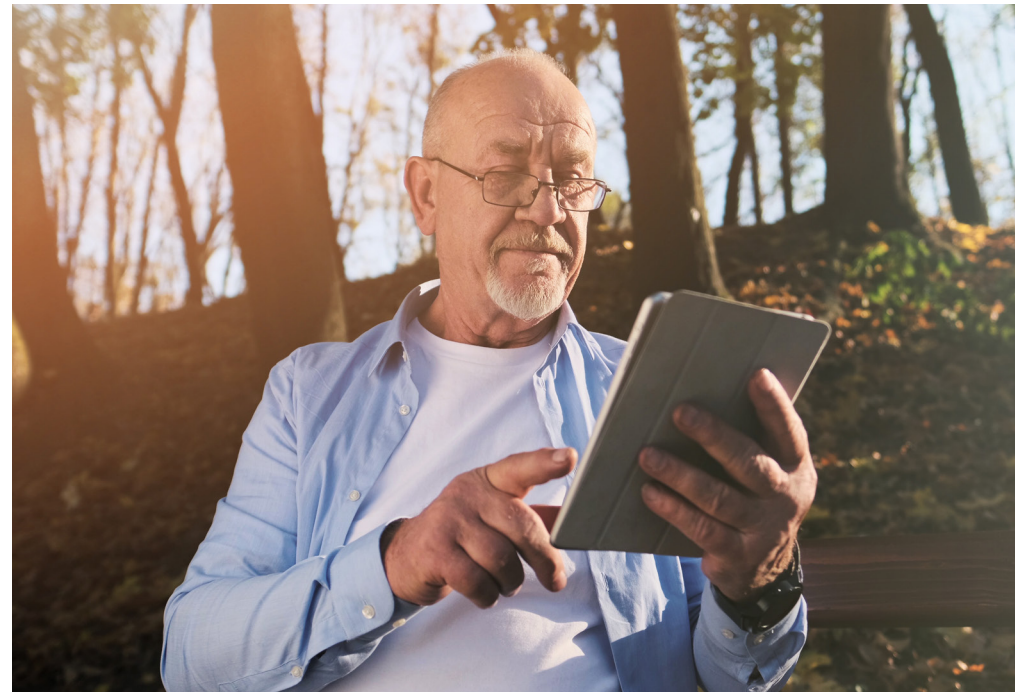
Date	Message / Campaign	Call to Action
17 Feb 2021	End of Year Training	Book on training
17 Feb 2021	Bereavment Notification Proforma Launch	New process to follow
18 Feb 2021	Exit Cap (Update)	Information
24 Feb 2021	End of Year Preview Template	Use template for submission of year end data
01 Mar 2021	Email Address Collection	Supply member email data
02 Mar 2021	Understanding Employer Roles - LGA Training	Promote LGA training
02 Mar 2021	3rd party Payroll Campaign	Information
04 Mar 2021	Introducing Your Employer Engagement Team	Information
04 Mar 2021	Exit Cap (Update)	Information
08 Mar 2021	Outsource Payroll	Information
19 Mar 2021	Scheme Leaver Essentials Training Invitation	Book training

EMAILS – MEMBERS

Date	Message / Campaign	Call to Action
January	Overseas Pension Certificate Request	Form
	Surveys: Bereavement, Retirement, Estimates, Transfer Out	Survey
February	Surveys: Bereavement, Retirement, Estimates, Transfer Out	Survey
March	MPO: Nominate a Beneficiary	Update MPO
	MPO: Update Telephone Details	Update MPO
	Surveys: Bereavement, Retirement, Estimates, Transfer Out	Survey

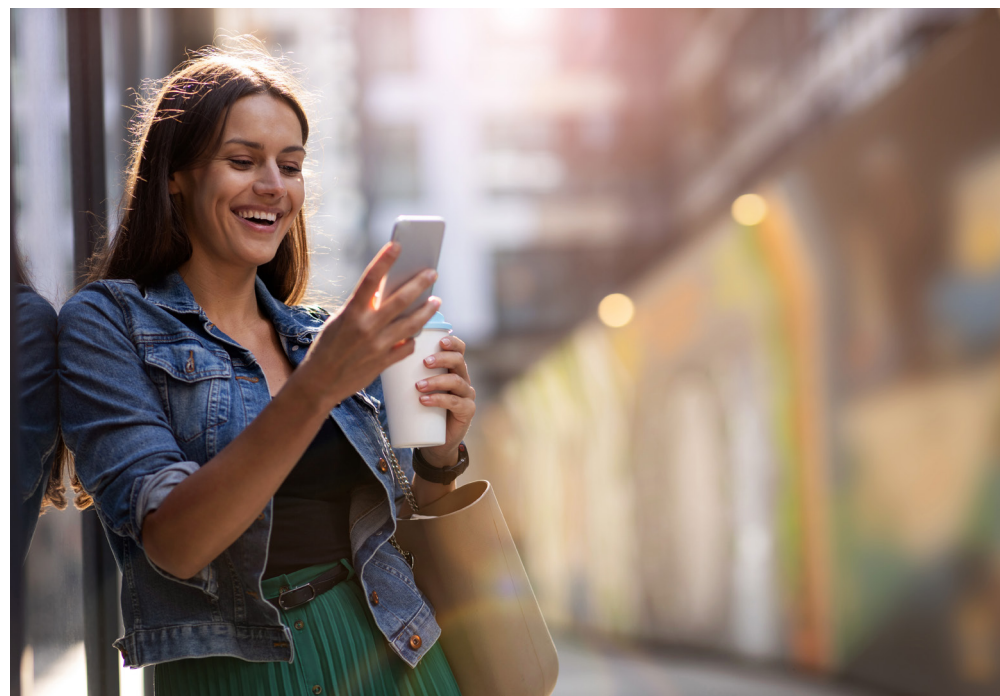
QUARTERLY ENGAGEMENT COMMUNICATIONS OVERVIEW

- Overseas Members email activity (to encourage submission of complete life certificate).
- Targeted email / website communications to update Members of service issues relating to disinvestment of Prudential AVC's.
- Updated Q3 Covid-19 impact reports issues to Clients.
- LGPS Essentials program was launched to Members (bookable monthly sessions for 21/22).
- LPPA shortlisted for Administrator of the Year in the Pension Age Awards 2021.
- External media (PR) activity issued promoting success of LPPA's partnership with Target Professional Services (contact tracing and mortality tracing), and the award of contract with Civica for their UPM pension administration system.



ANNUAL ENGAGEMENT COMMUNICATIONS OVERVIEW

- Bulk email platform brought in-house (delivering time and cost efficiencies, more responsive to business needs, and improved analytics).
- Creative and design work brought in-house (more professional communications, and consistent application of LPPA brand style).
- Ongoing development of lppapensions.co.uk (improved Member experience, simplified journey to access pension information through MPO).
- Member engagement email campaigns to deliver KPI's (increase MPO registration, improve quality of personal contact data including personal email address and telephone number, and death beneficiary nominations).
- Remote (online) Employer training and workshops, delivered via Teams (and recorded / distributed via email to extend reach of activity).
- Content strategy implemented to review pension information published offline (Member correspondence) and online (website, email) to ensure clear, understandable, and simplified communications.
- During the latter part of 2020/21 five virtual visits were carried out with Employers in need of one to one support.
- Over 40 delegates from across all Employers attended training, the topics included leaver essentials, ill health and absence and assumed pensionable pay to name a few.





Doing The Right Thing

Data Quality

Key



QUARTERLY

Quarterly Figures



ANNUAL

Annual Figures



Data Quality (TPR scores)

QUARTERLY COMMON DATA

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	1	6	22
Surname	0	0	0
Forename / Initials	0	0	0
Sex	0	0	0
Date of Birth	0	0	0
Date started pensionable service / Policy / Contributions	0	0	0
Expected retirement / maturity / target retirement date	0	0	0
Membership status	0	0	0
Last event status	0	0	0
Address	12	429	66
Postcode	14	448	98
Total fails	27	883	186
Individual fails	15	454	120
Total members	6,426	6,636	6,412
Accuracy rate	99.8%	93.2%	98.1%

Total accuracy rate

97.0%

Data Quality (TPR scores)



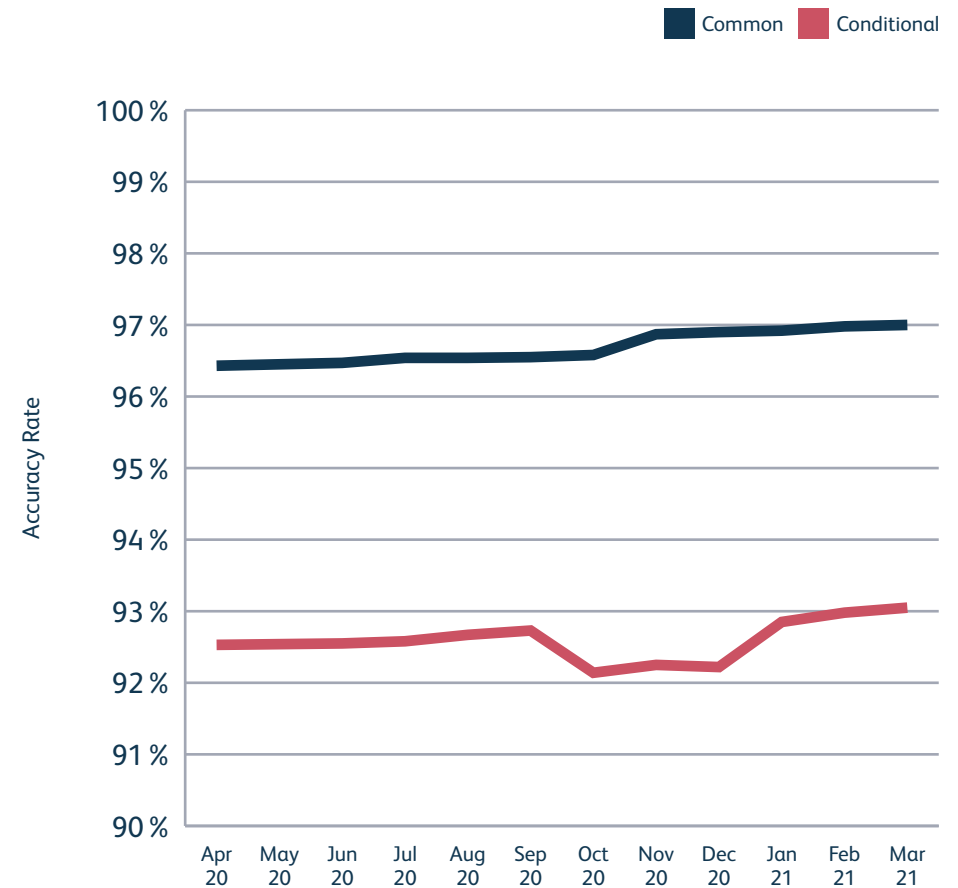
QUARTERLY CONDITIONAL DATA

Data Item	Fails
Divorce records	0
Transfer In	8
AVC's / Additional Contributions	1
Deferred Benefits	0
Tranches (DB)	438
Gross Pension (Pensioners)	0
Tranches (Pensioners)	34
Gross Pension (Dependants)	3
Tranches (Dependants)	0
Date of leaving	3
Date Joined Scheme	0
Employer Details	1
Salary	242
Crystallisation	40
Annual Allowance	188
LTA Factors	0
Date Contracted Out	53
Pre-88 GMP	97
Post-88 GMP	444
Total fails	1,552
Individual fails	1,354
Total members	19,474

Total accuracy rate 93.0%



ANNUAL COMMON & CONDITIONAL ACCURACY RATE



LPP

Local Pensions Partnership
Administration