

LPP

Local Pensions Partnership
Administration



Havering Pension Fund

Quarterly Administration Report

1st October – 31st December 2021

lppapensions.co.uk

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Definitions

Page 7

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 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 11 & 12

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

Page 14

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 16

Retirements

Shows how quickly pension and lump sum payments are paid to Members – distinguishing between late/early notifications and Members with AVC's. Individual tables provide further detail.

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. The Annual Calls answered performance figures are not Client specific (as we are unable to measure abandoned calls by Client).

A 'resolved' call or email requires no further action, as the enquiry has been answered in full. Any that are 'unresolved' will require an action of either a case or chase case to be created, or documents that need to be added to an existing case.

As the needs of our business, Clients and Members change, we adapt our reporting to suit the current trends and ensure sight of common topics. For this reason it is necessary to update and add new topics in the reason for calls. To accommodate the multitude of reasons we have created a "Other" category which includes (but not limited to) 'Information Only', 'Website', 'Resend Documents'.

Page 23 & 24

Customer Satisfaction Scores

The Helpdesk satisfaction scores (telephone 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 29 & 30

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 37 & 38

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.

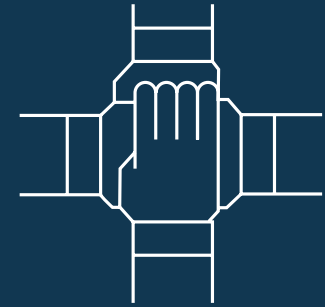
Within LPPA, our values play a fundamental role in guiding our behaviour as we grow our pensions services business and share the benefits with our Clients.



Annual Plan 2021/22

 COMPLETED
  DUE

	Apr 21	May 21	Jun 21	Jul 21	Aug 21	Sep 21	Oct 21	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22
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				✓	✓				✓			

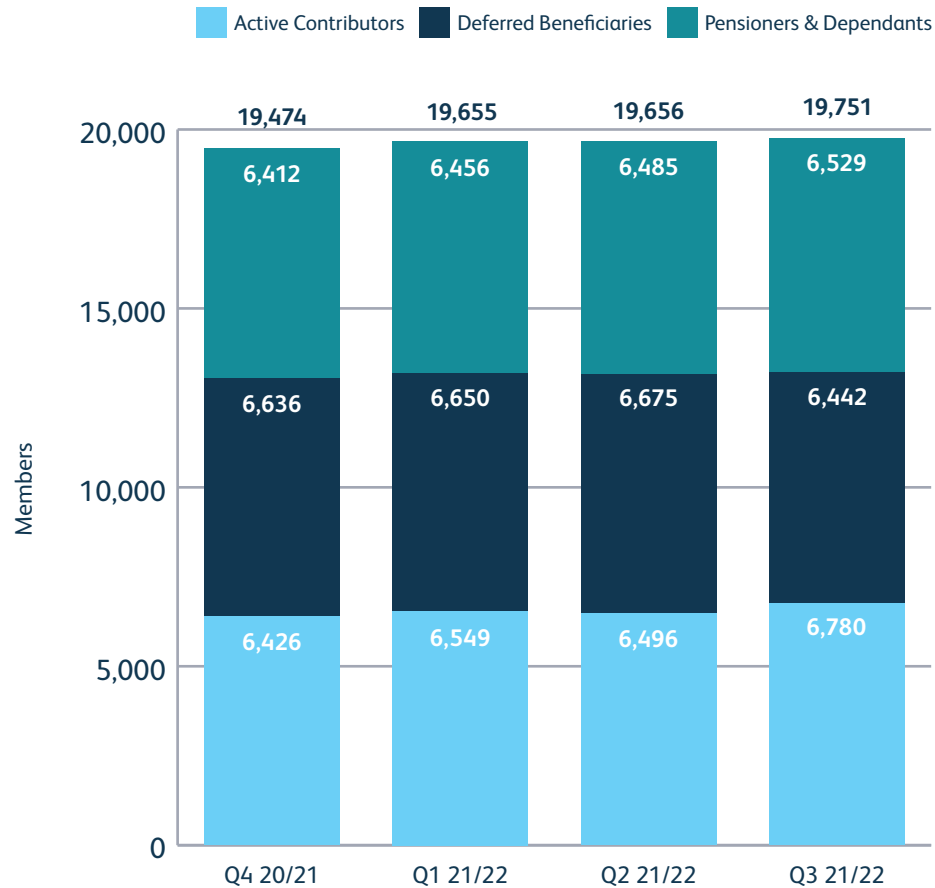


Working Together

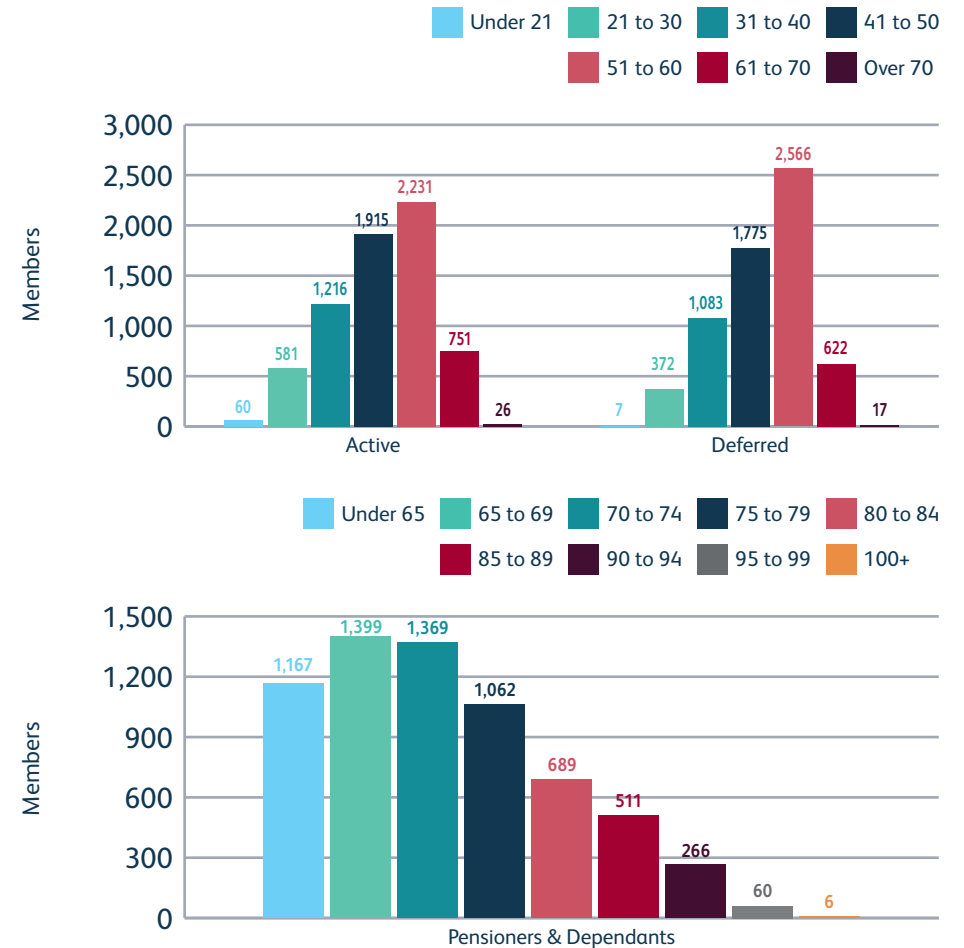
Fund Membership

Fund Membership

TOTAL FUND MEMBERSHIP



CURRENT AGE DEMOGRAPHIC



Fund Membership

LEAVERS

These leavers are currently included in the active membership figures in the previous page.

Total Current Leavers	Received*	Pending**
383	3	380

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

** *Awaiting information from Employer*

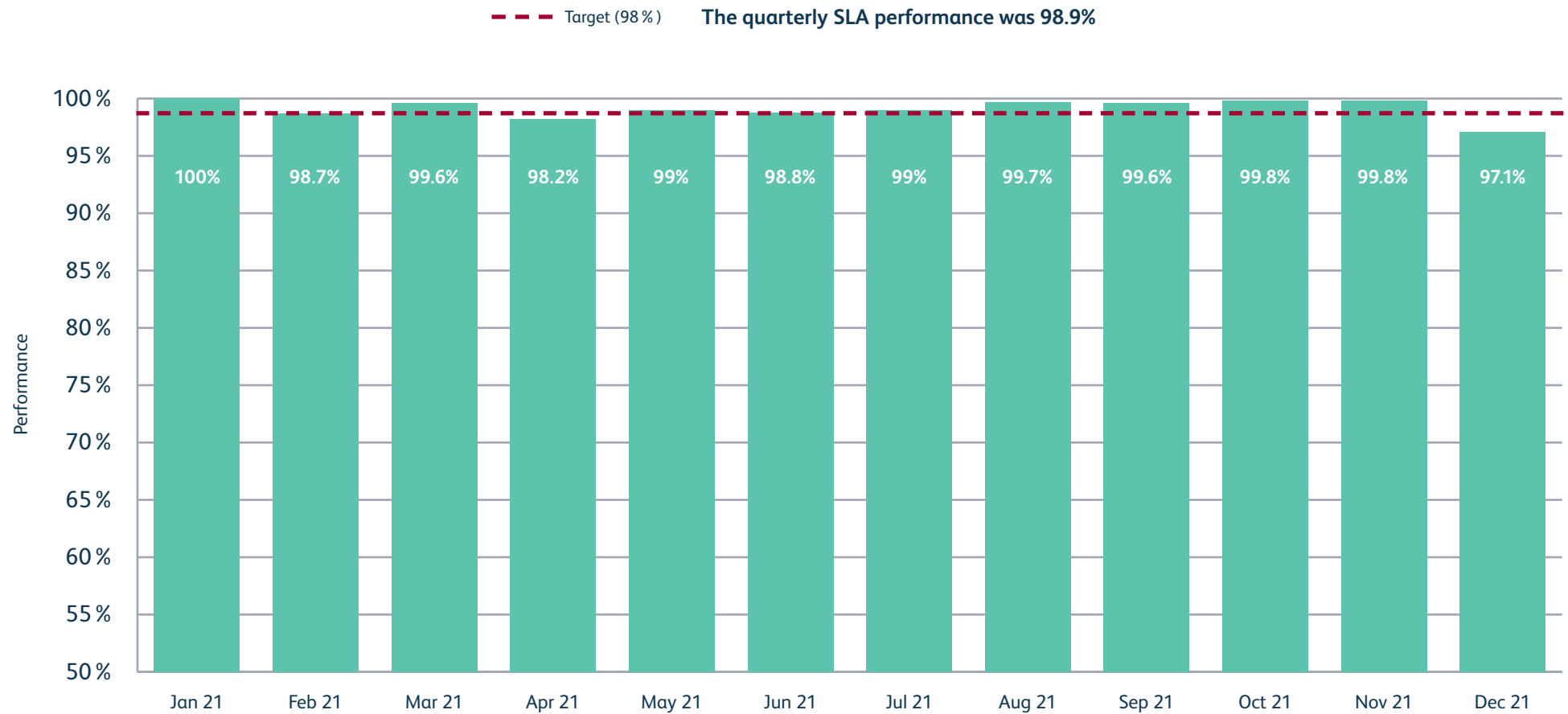


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Casework Performance Against SLA

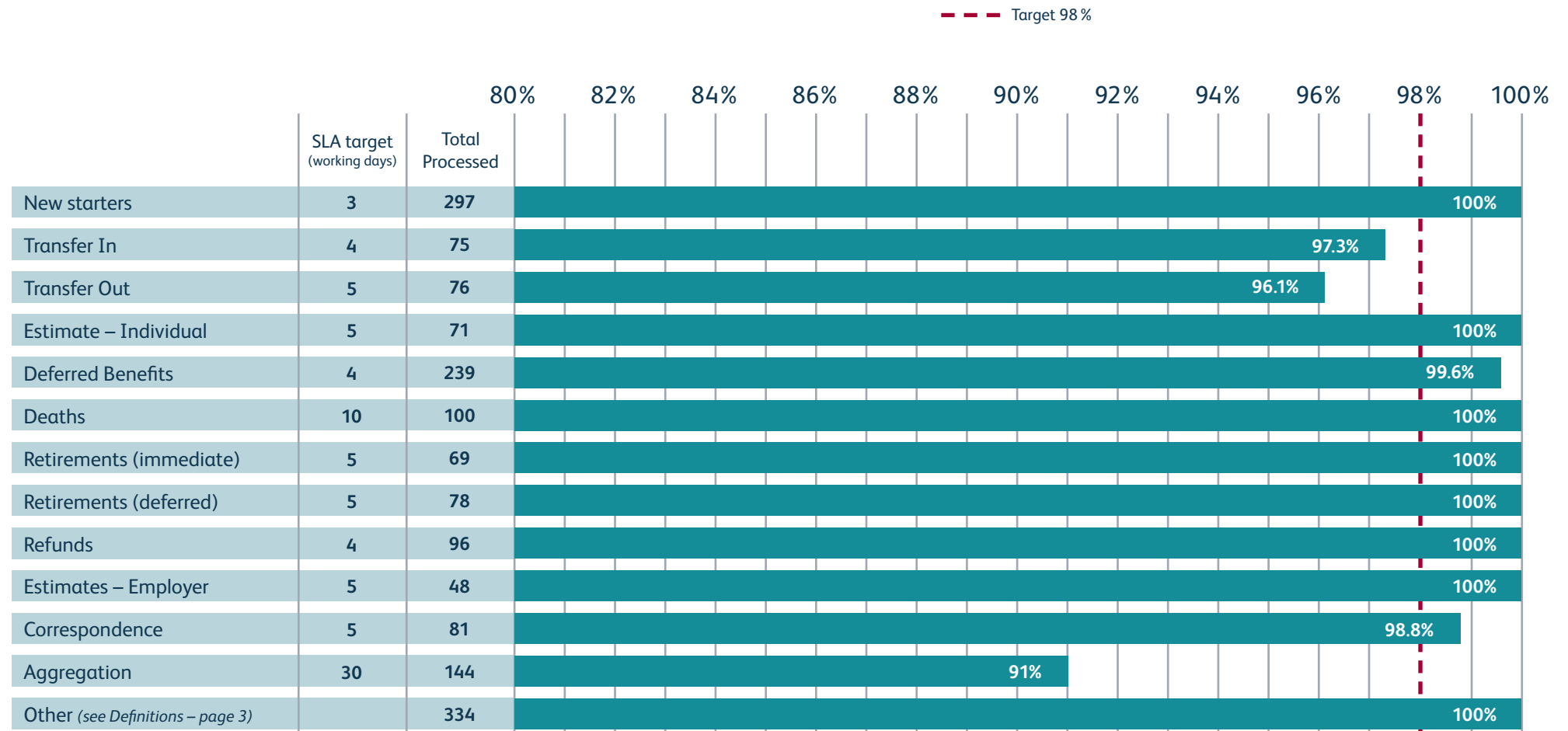
Casework Performance Against SLA

PERFORMANCE – ALL CASES



Casework Performance Against SLA

PERFORMANCE STANDARD



Casework Performance Against SLA

ONGOING CASEWORK AT THE END OF THE REPORTING QUARTER

	Brought Forward at 01/10/21	Completed	Received	Outstanding as of 31/12/21
New Starters	16	297	297	16
Transfer In	137	75	51	113
Transfer Out	64	76	84	72
Estimate - Individual	11	71	68	8
Deferred Benefits	162	239	241	164
Deaths	97	100	102	99
Retirements (Immediate)*	44	69	62	37
Retirements (Deferred)*	56	78	71	49
Refunds	31	96	97	32
Estimates - Employer	1	48	49	2
Correspondence	17	81	70	6
Aggregation	54	144	191	101
Other (see Definitions – page 3)	52	334	325	43
TOTALS	742	1,708	1,708	742

* In Q4 20/21, we trialed a new way of prioritising retirement cases. This resulted in the retirement process being split out into its two component parts 1) the options stage 2) the payment stage. The number of completed cases reported in this table may therefore vary to the number of retirements processed on page 11, which are reported against the SLA. We have since re-designed the workflow so that the two component parts of the process can be handled under the one case type.

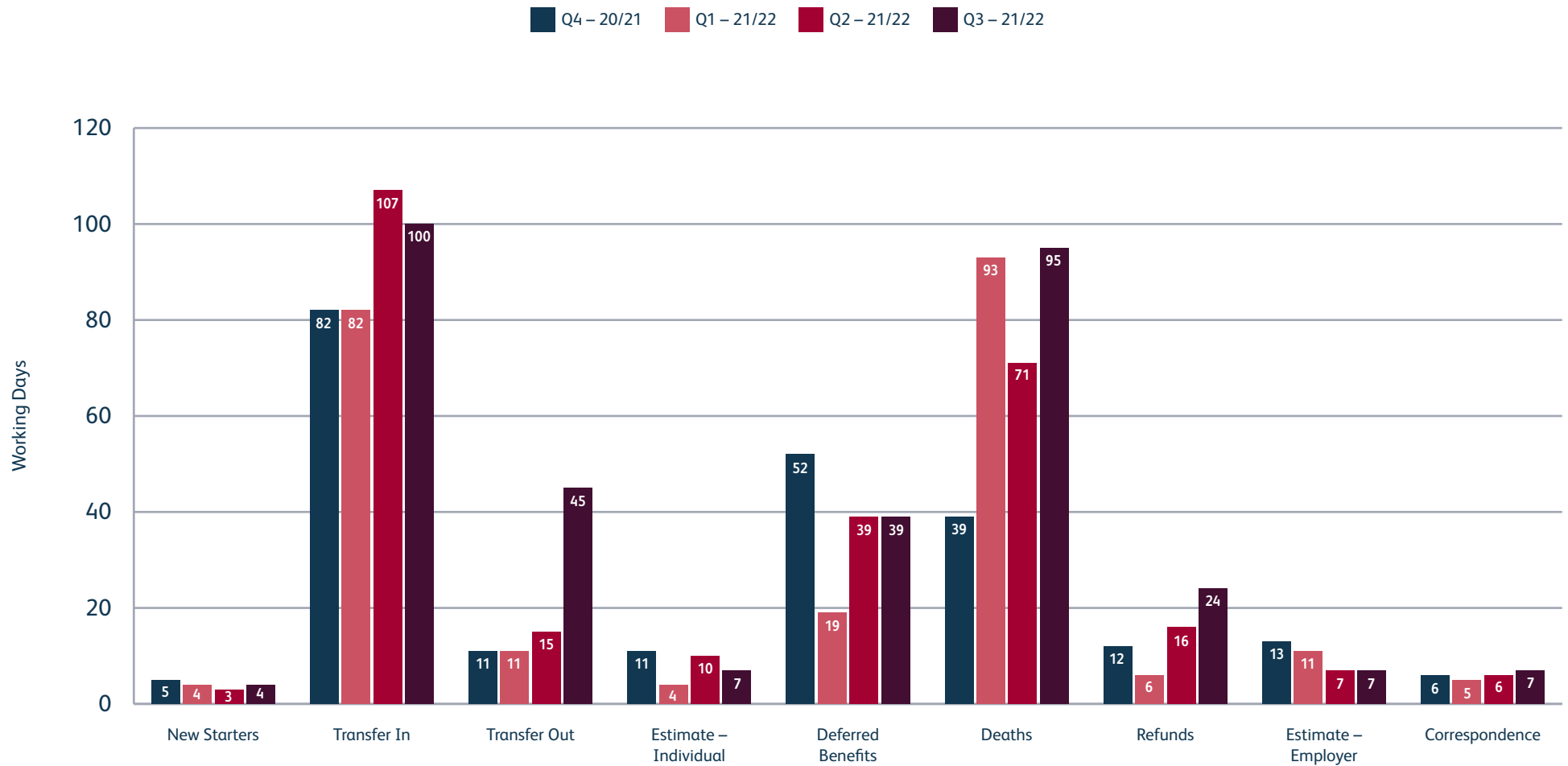


Doing The Right Thing

Elapsed Times

Elapsed Times

ELAPSED DAYS BY QUARTER





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Retirements

Retirements

	Retirements (Deferred)*			Retirements (Immediate)*		
	Total cases	On Time	SLA	Total cases	On Time	SLA
January 21	25	25	100%	14	14	100%
February 21	29	29	100%	12	12	100%
March 21	26	26	100%	20	20	100%
April 21	18	18	100%	12	10	83.3%
May 21	22	21	95.5%	12	11	91.7%
June 21	22	22	100%	10	9	90%
July 21	13	13	100%	15	15	100%
August 21	15	15	100%	8	8	100%
September 21	18	18	100%	21	21	100%
October 21	27	27	100%	33	33	100%
November 21	27	27	100%	24	24	100%
December 21	24	24	100%	12	12	100%

** In Q4 20/21, we trialed a new way of prioritising retirement cases. This resulted in the retirement process being split out into it's two component parts 1) the options stage 2) the payment stage. The number of completed cases reported in this table may therefore vary to the number of retirements processed on page 11, which are reportable against the SLA. We have since re-designed the workflow so that the two component parts of the process can be handled under the one case type.*



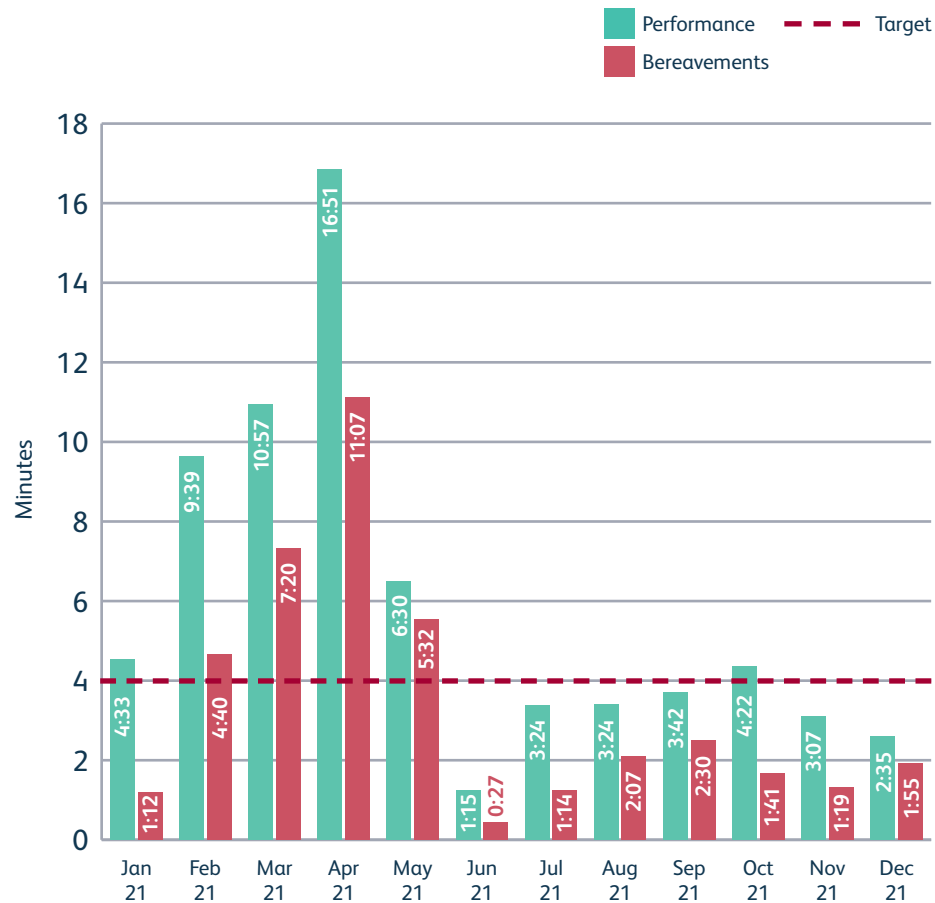
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Helpdesk Performance

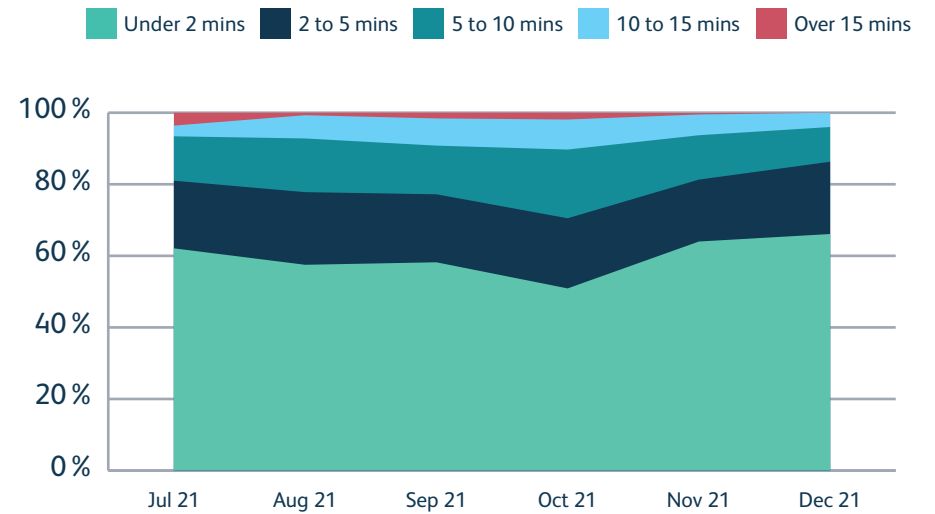
The Helpdesk deals with all online enquiries and calls from Members for all funds that LPPA provide administration services for.

Helpdesk Performance - Calls

AVERAGE WAIT TIME



WAIT TIME RANGE

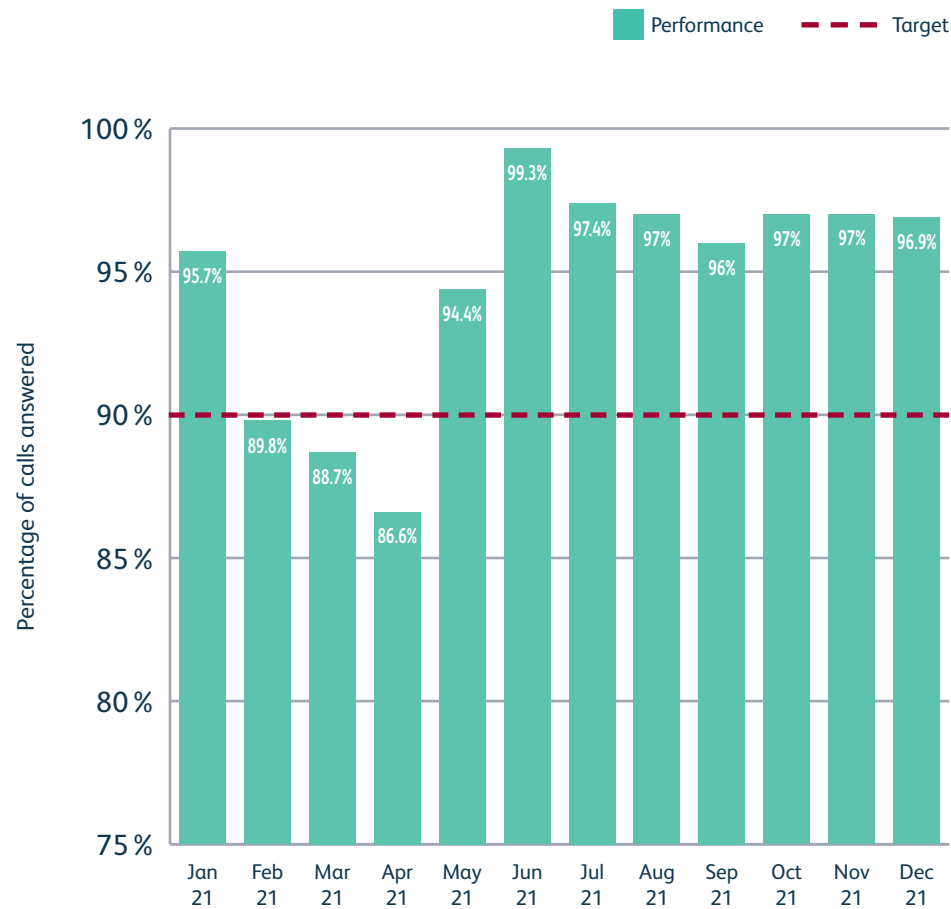


	Under 2 Mins	2 to 5 Mins	5 to 10 Mins	10 to 15 Mins	Over 15 Mins
Jul 21	62.1 %	18.9 %	12.4 %	3.0 %	3.6 %
Aug 21	57.5 %	20.3 %	15.0 %	6.5 %	0.7 %
Sep 21	58.2 %	19.0 %	13.6 %	7.6 %	1.6 %
Oct 21	50.9 %	19.6 %	19.2 %	8.4 %	1.9 %
Nov 21	64.0 %	17.3 %	12.4 %	5.8 %	0.4 %
Dec 21	66.1 %	20.2 %	9.7 %	4.0 %	0 %

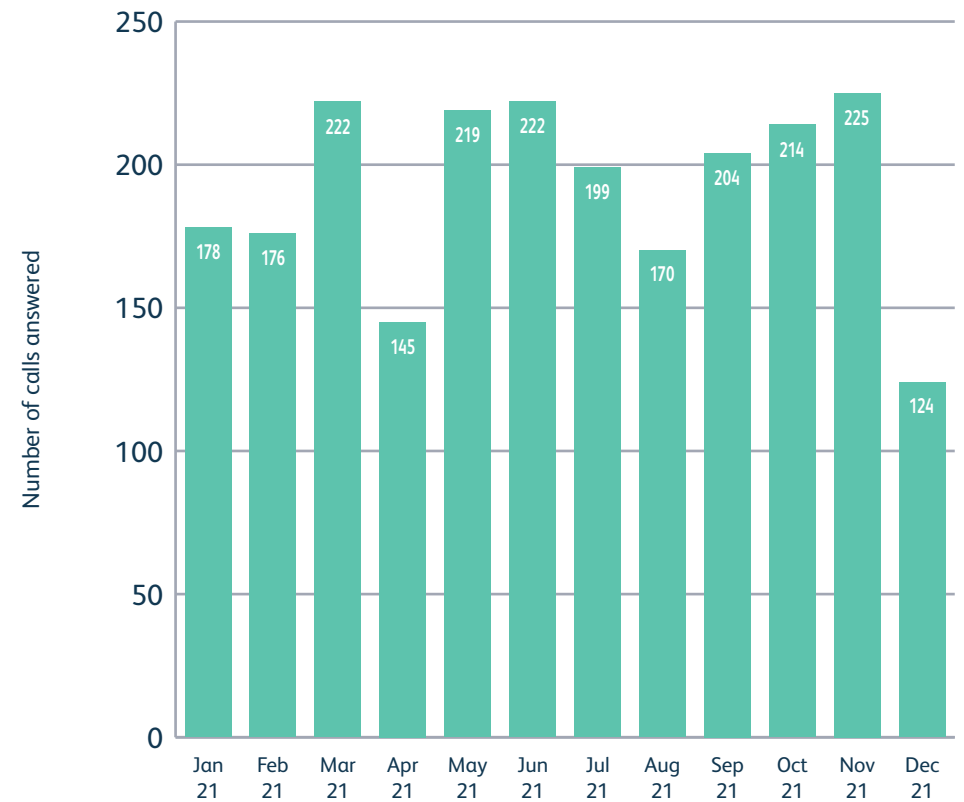
Helpdesk Performance - Calls

CALLS ANSWERED

(ALL LPPA)

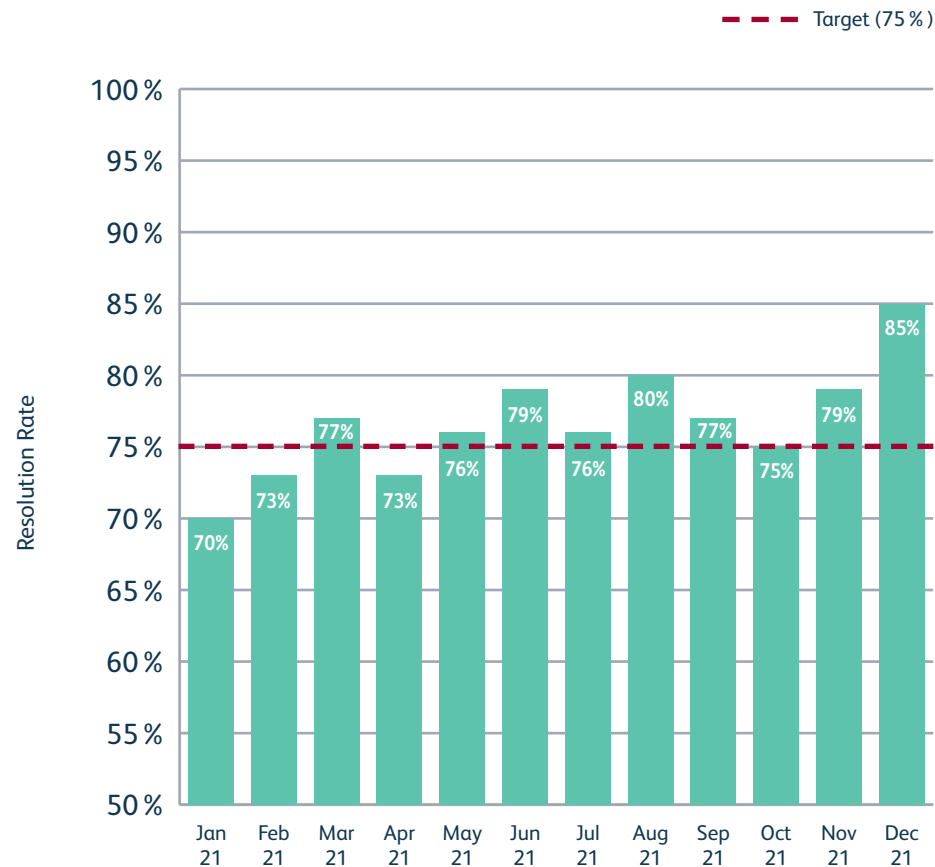


CALL VOLUMES



Helpdesk Performance - Calls

RESOLUTION RATE*



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

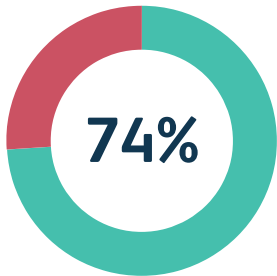
WHAT DO MEMBERS CALL ABOUT?

	OCT 21	NOV 21	DEC 21
Annual Benefit Statement	7	2	0
Annual Allowance	0	1	0
Additional Voluntary Contributions / Additional Pension Contributions	3	3	2
Bereavement	8	19	21
Deferred	3	9	1
Divorce	1	3	1
Estimate	13	11	8
Life Certificates	0	0	0
McCloud	0	0	0
My Pension Online	18	18	10
P60	4	1	2
Payslip	20	19	11
Pension Increase	0	0	0
Refund	0	9	3
Retirement	75	66	39
Transfer	20	23	8
Update Details	18	15	9
Other	24	26	9
TOTALS	214	225	124

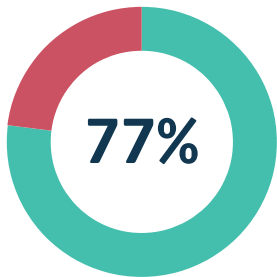
Helpdesk Performance - Web Enquiries

RESOLUTION RATE* (TARGET 75%)

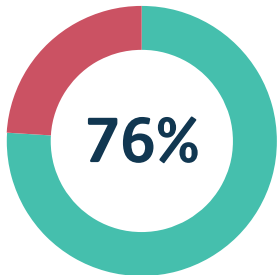
OCTOBER



NOVEMBER

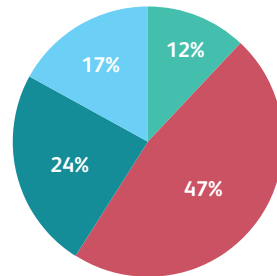


DECEMBER

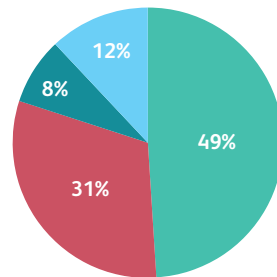


ENQUIRY HANDLING RATE

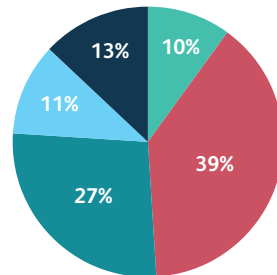
OCTOBER



NOVEMBER



DECEMBER



Under 1 Day
1 to 2 Days
2 to 3 Days
3 to 5 Days
Over 5 Days

WHAT DO MEMBERS ENQUIRE ABOUT?

	OCT 21	NOV 21	DEC 21
Annual Benefit Statement	0	0	0
Annual Allowance	1	5	0
Additional Voluntary Contributions / Additional Pension Contributions	0	1	0
Bereavement	2	3	2
Deferred	2	2	0
Divorce	2	1	0
Estimate	4	13	4
Life Certificates	1	0	1
McCloud	0	0	0
My Pension Online	22	21	15
P60	0	0	1
Payslip	5	4	4
Pension Increase	0	0	0
Refund	4	4	0
Retirement	27	28	25
Transfer	8	6	2
Update Details	12	13	6
TOTALS	90	101	60

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

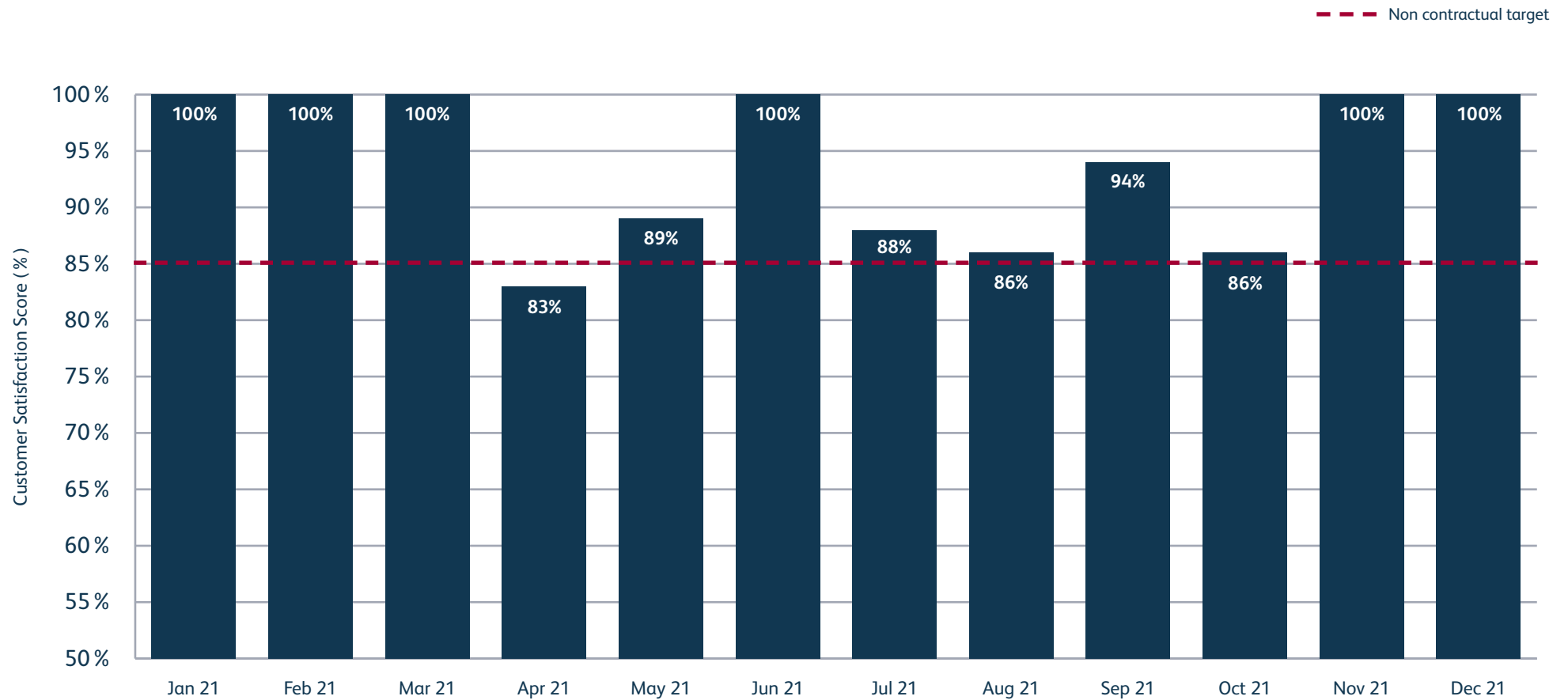


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Customer Satisfaction Scores

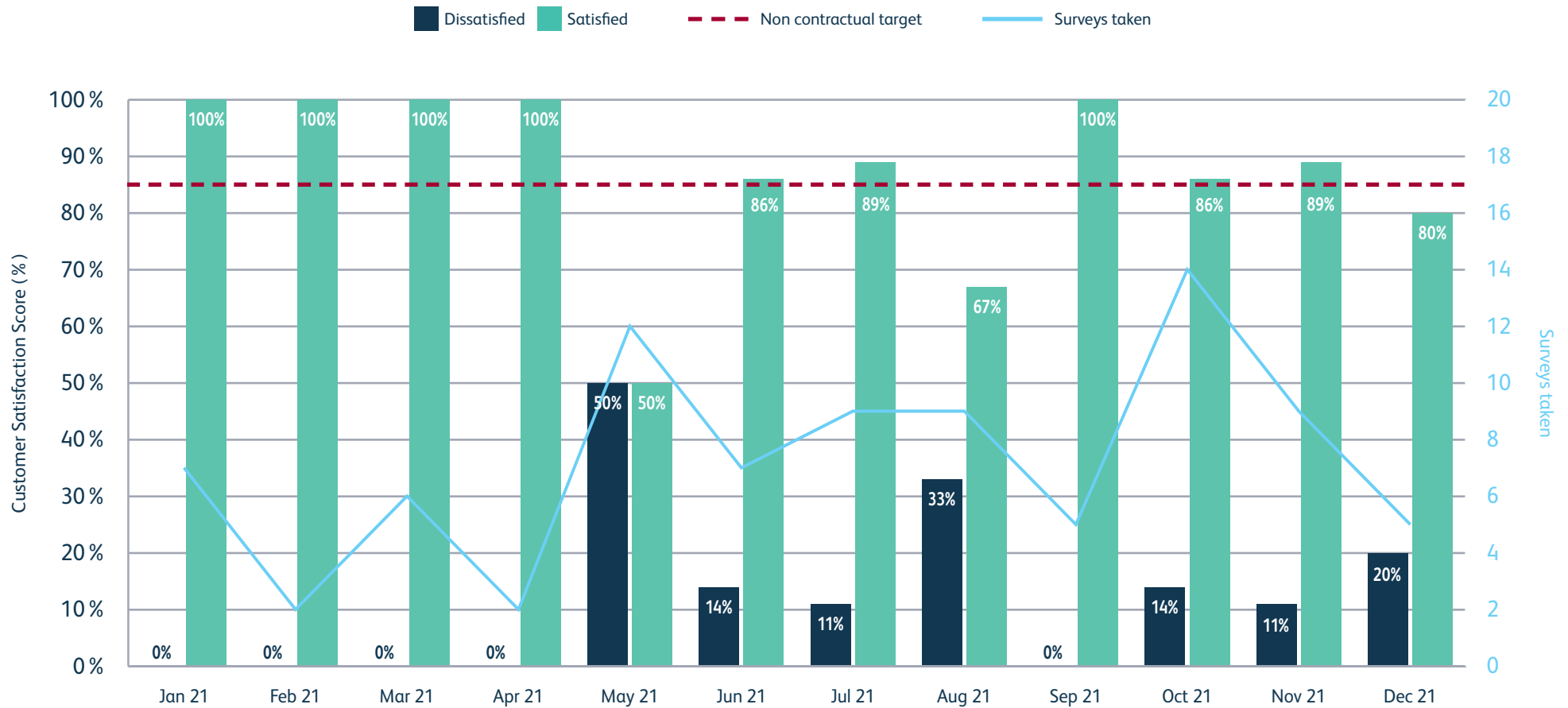
Customer Satisfaction Scores

HELPDESK SATISFACTION (CALLS)



Customer Satisfaction Scores

RETIREMENTS



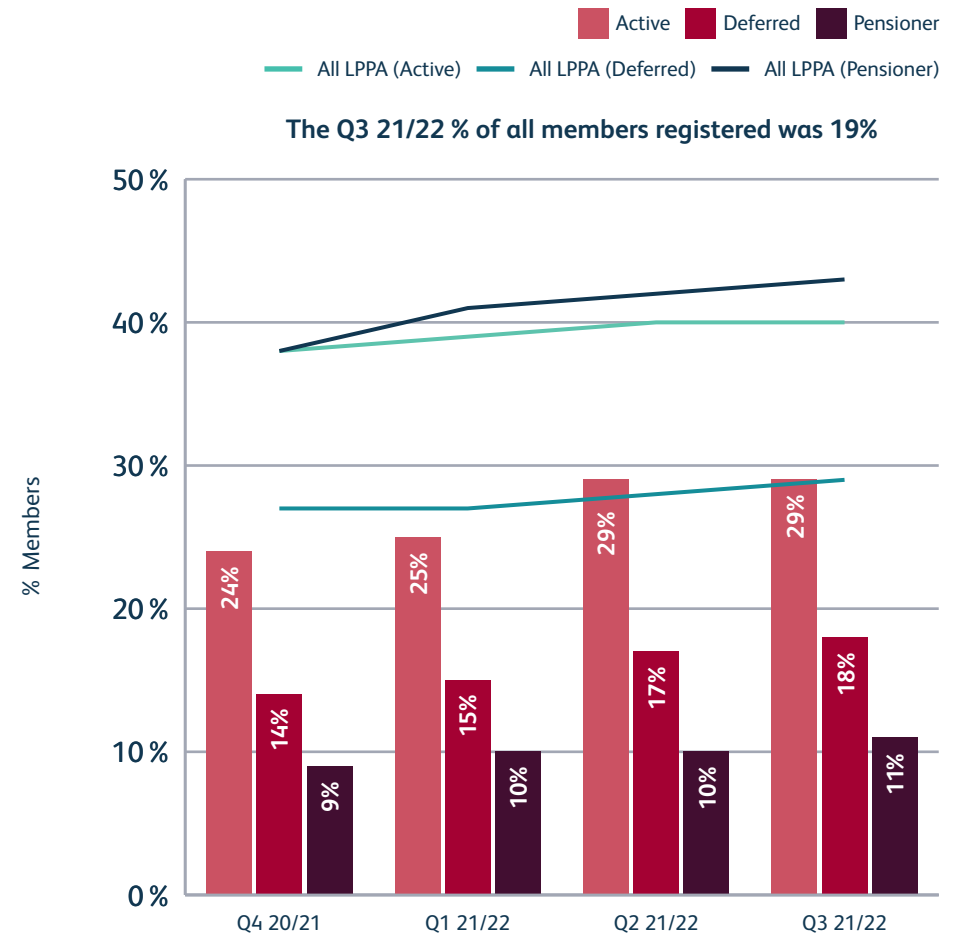
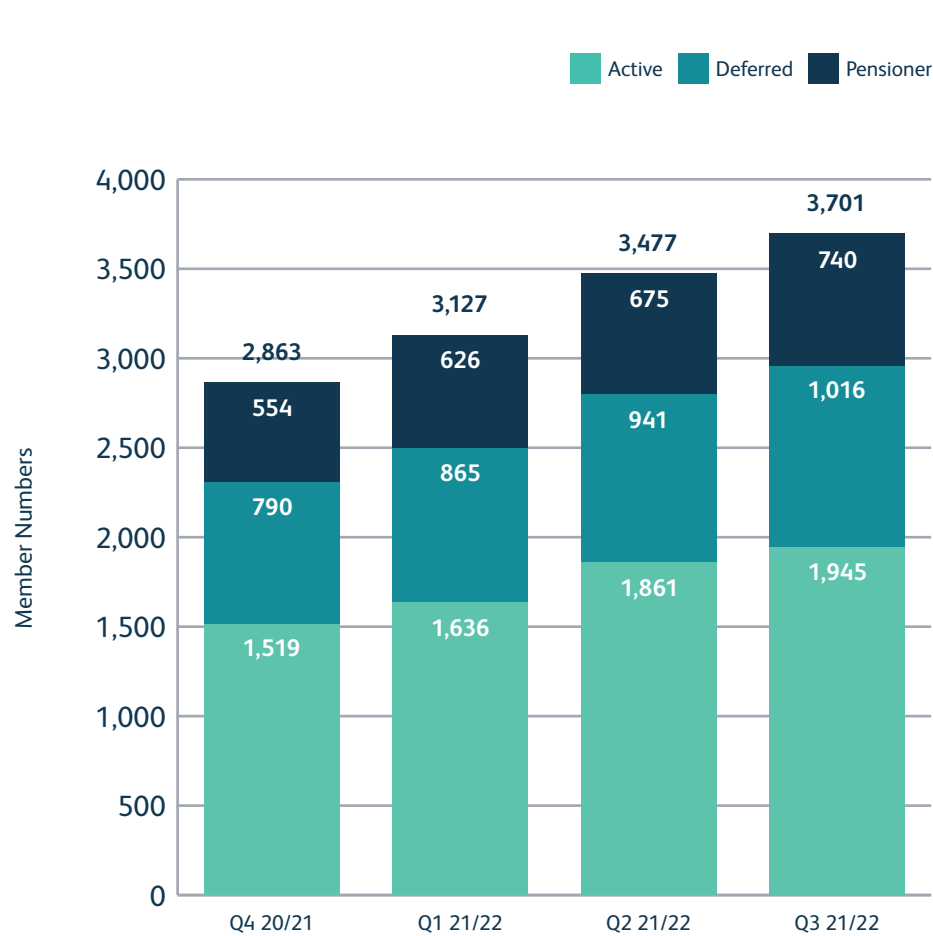


Forward Thinking

My Pension Online (MPO)

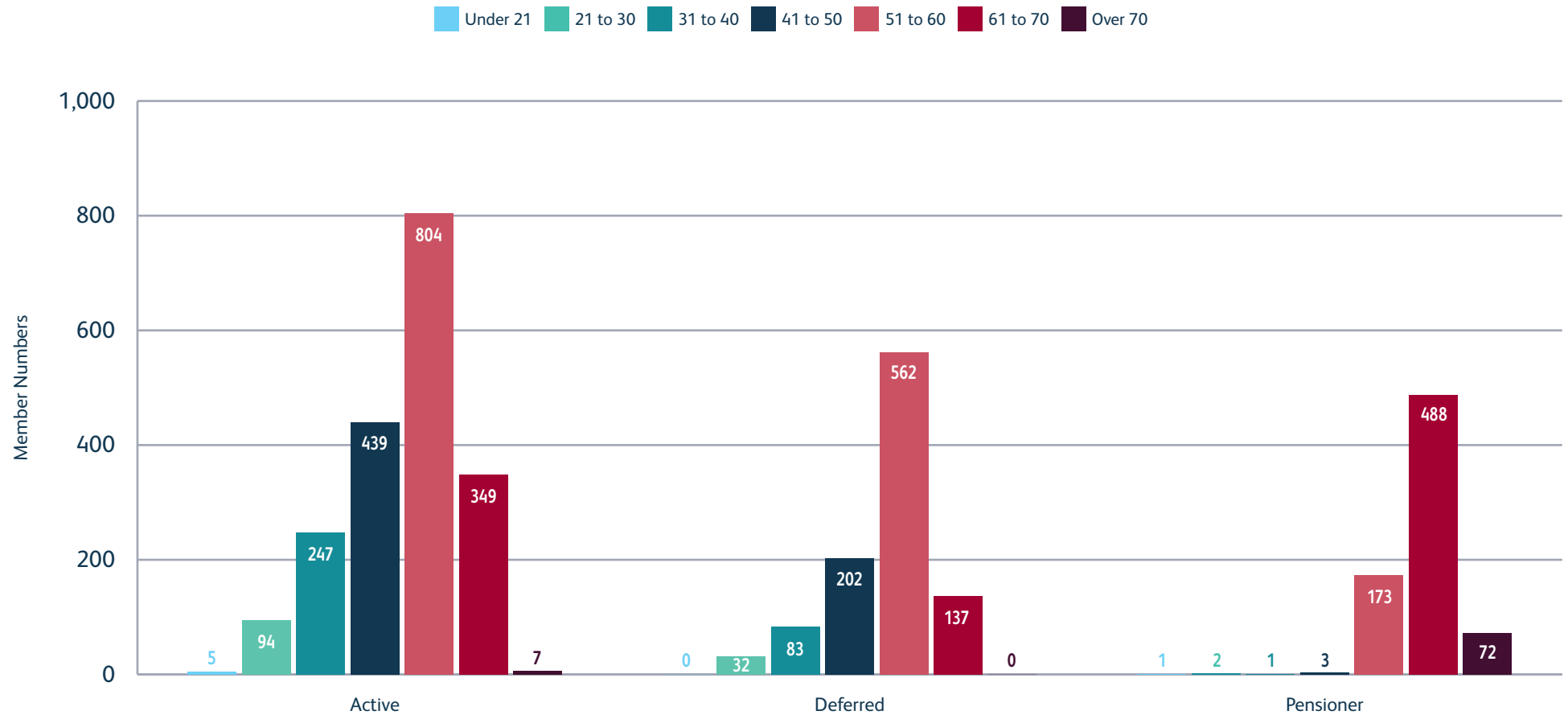
My Pension Online

MEMBERS REGISTERED



My Pension Online

AGE DEMOGRAPHIC





Forward Thinking

Member Contact Data

Member Contact Data

EMAIL ADDRESSES

	Q4 - 20/21	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22
Active Contributors	3,134 (48.77%)	3,326 (50.79%)	3,439 (52.94%)	3,582 (52.83%)
Deferred Beneficiaries	1,750 (31.36%)	1,803 (32.28%)	1,869 (33.29%)	1,975 (34.51%)
Pensioner and Dependents	1,457 (22.72%)	1,551 (24.02%)	1,625 (25.06%)	1,717 (26.30%)

TELEPHONE NUMBERS

	Q4 - 20/21	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22
Active Contributors	1,338 (20.82%)	1,351 (20.63%)	1,437 (22.12%)	1,493 (22.02%)
Deferred Beneficiaries	1,088 (16.40%)	1,111 (16.71%)	1,169 (17.51%)	1,247 (19.36%)
Pensioner and Dependents	1,236 (19.28%)	1,330 (20.60%)	1,405 (21.67%)	1,497 (22.93%)

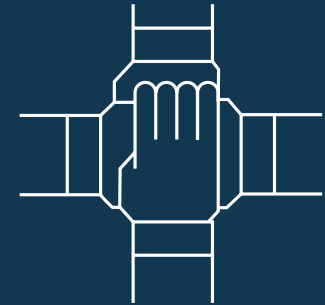
Member Contact Data

DEATH NOMINATION

	Q4 - 20/21	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22
Active Contributors	2,506 (39.00%)	2,520 (38.48%)	2,591 (39.89%)	2,630 (38.79%)

E-COMMUNICATIONS OPT-OUT

	Q4 - 20/21	Q1 - 21/22	Q2 - 21/22	Q3 - 21/22
Active Contributors	85 (1.32%)	84 (1.28%)	80 (1.23%)	82 (1.21%)
Deferred Beneficiaries	94 (1.42%)	89 (1.34%)	89 (1.33%)	89 (1.38%)
Pensioner and Dependants	67 (1.04%)	75 (1.16%)	80 (1.23%)	82 (1.26%)



Working Together

Employer Engagement & Communication Activity

Employer Engagement & Communication Activity

DELIVERED – ALL CLIENTS

1. Our 'Life is for Living' retirement campaign was communicated to all client members. This included a survey asking members for their views on retirement in a single word, sentence, or image. There were over **12,000 responses** (across all clients) and the LPPA Communications Team have [created an online video & report](#) detailing the findings.
2. In addition to our existing Blue Light member panel, **our first LGPS member panel** took place. Both panels will meet quarterly and will continue to grow through ongoing recruitment of members ... they will offer an opportunity to ensure LPPA communications continue to be useful and relevant to members.
3. A news story was published on the LPPA website to coincide with [Get Online Week \(18 Oct 21\)](#). The aim was to provide online tools and resources, to encourage members to visit and make more frequent use of the LPPA website.
4. A new survey was be launched to measure member satisfaction for **New Joiners** (those who have recently joined the pension scheme)
5. A new **monthly Employer bulletin (PensionPulse)** was launched with the aim of providing more frequent updates on training, LGA regulatory information and LPPA projects
6. A new animated video was made launched on the website for members. '[More than just a great pension](#)' was developed to explain defined benefit pension schemes to members, and the benefits that these schemes offer to Local Government, Police and Fire pension members
7. LPPA launched a [LinkedIn page](#), providing another useful employer engagement channel, in addition to our existing email, website and YouTube digital communications channels

Life is
for Living!



Employer Engagement & Communication Activity

SCHEDULED – ALL CLIENTS

1. The focus for the Engagement and Communications team in Q4 will be **Project PACE**, and delivering training sessions to Phase 1 employers on the new employer portal, as well as providing support for employer enquiries relating to the launch of our new administration system.
2. The launch of **PensionPoint**, the new member online portal which is replacing My Pension Online, will be a focus for our member communications activity in Q4. User guides and videos will be launched on the LPPA website and made available to members who want an overview of the new portal, or would like to understand how to register / gain access to PensionPoint
3. Q4 activity will also include sessions covering pension scheme and retirement essentials (member focused), as well as Year End training for employers.
4. Feedback from the new joiner process will be used to update and improve the new joiner pages on our website.



Employer Engagement & Communication Activity

ENGAGEMENT COMMUNICATIONS – CLIENT SPECIFIC

- Virtual employer visits were held with 2 Havering Pension Fund employers
- 7 Havering Pension Fund employers attended Leaver Essentials training
- 8 Havering Pension Fund employers attended Ill Health Awareness Training



Employer Engagement & Communication Activity

EMPLOYERS

Date	Employer	Activity	Number in attendance
5 October 2021	Coopers Coborn School	Leaver essentials	1
5 October 2021	L B Havering	Leaver essentials	6
10 November 2021	Coopers Coborn School	Ill Health Awareness	1
10 November 2021	London Borough of Havering	Ill Health Awareness	7
24 November 2021	Drapers MAT	Employer Visit (support)	2
22 December 2021	Hornchurch High and Harrow Lodge Primary School	Employer Visit (support)	1

EMAILS – EMPLOYERS

Date	Message / Campaign	Call to Action
OCTOBER	Newsletter	Newsletter
	PACE: Phase 1	Information
NOVEMBER	PensionPulse	Information
DECEMBER	PensionPulse	Information
	LPPA Christmas card	Notification



Doing The Right Thing

Data Quality

Data Quality (TPR scores)

QUARTERLY COMMON DATA

Data Item	Active	Deferred	Pensioner / Dependant
NI Number	0	5	15
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	4	376	36
Postcode	7	396	67
Total fails	11	777	118
Individual fails	7	401	82
Total members	6,780	6,442	6,529
Accuracy rate	99.9%	93.8%	98.7%

Total accuracy rate

97.5%

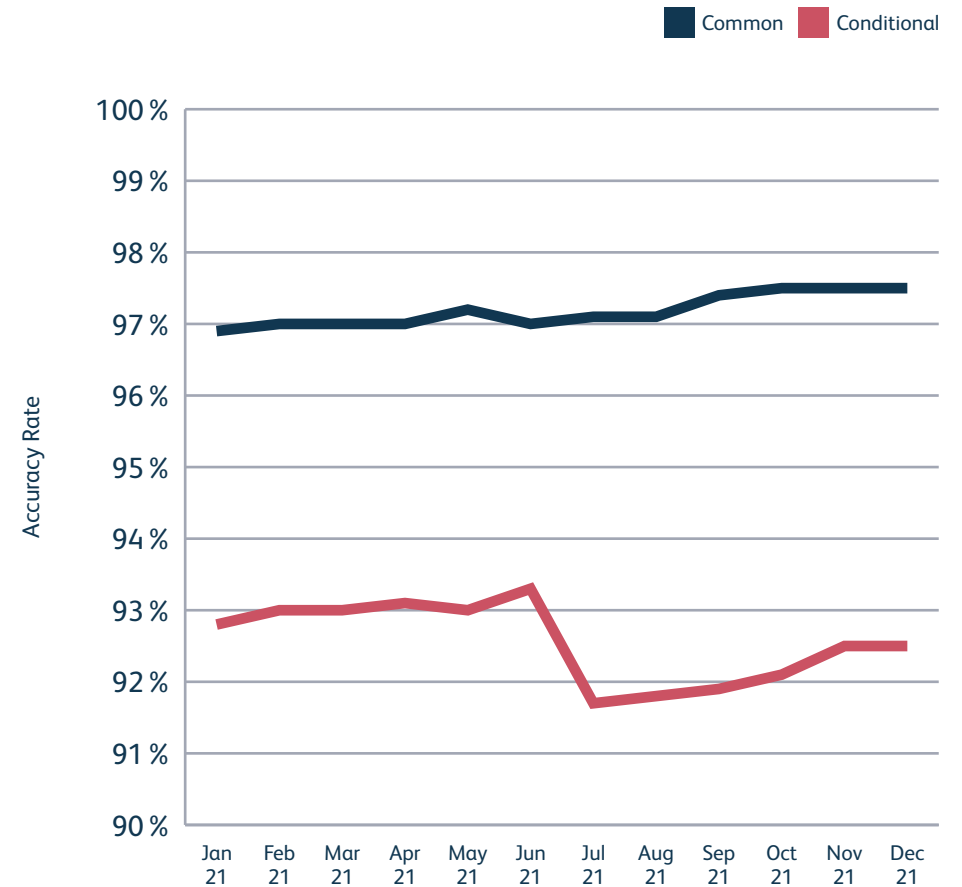
Data Quality (TPR scores)

QUARTERLY CONDITIONAL DATA

Data Item	Fails
Divorce records	0
Transfer In	6
AVC's / Additional Contributions	1
Deferred Benefits	2
Tranches (DB)	110
Gross Pension (Pensioners)	1
Tranches (Pensioners)	35
Gross Pension (Dependants)	6
Tranches (Dependants)	1
Date of leaving	3
Date Joined Scheme	0
Employer Details	0
Salary	731
Crystallisation	39
Annual Allowance	185
LTA Factors	0
Date Contracted Out	52
Pre-88 GMP	88
Post-88 GMP	422
Total fails	1,682
Individual fails	1,488
Total members	19,751

Total accuracy rate 92.5%

ANNUAL COMMON & CONDITIONAL ACCURACY RATE



LPP

Local Pensions Partnership
Administration