



LPP

Local Pensions Partnership
Administration

Havering Pension Fund

Administration Report - Annual Appendix

1st April 2023 - 31st March 2024

lppapensions.co.uk

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ANNUAL SUMMARY

LPPA has made considerable progress in ensuring that monthly casework performance is consistently delivered against the 95% target, and in line with contractual obligations.

Helpdesk and Retirement satisfaction scores have been reported at client level to provide a more specific view of satisfaction scores for members. To improve the service provided to clients, employers and members, a key focus has been on delivering more functionality through the online self-service portals, and enabling more automation across the casework processes that are integral to our administration responsibilities. This will remain a priority as we move forwards into 2024-25, to ensure that the quality of casework continues to improve, and that this is reflected in both the member and employer experience.



Forward thinking...
Working together...
Doing the right thing...
Committed to excellence...



Helpdesk performance has continued to trend in the right direction in 2023-24, with average call wait times below the non-contractual 4-minute target.

McCloud has been a significant project in the year and will continue to be a key focus in 2024-25, as LPPA follows the national guidelines and timescales relating to the implementation of the remedy.

All regulatory and statutory deadlines in the year were successfully met.

Casework Performance Against SLA

In this section...

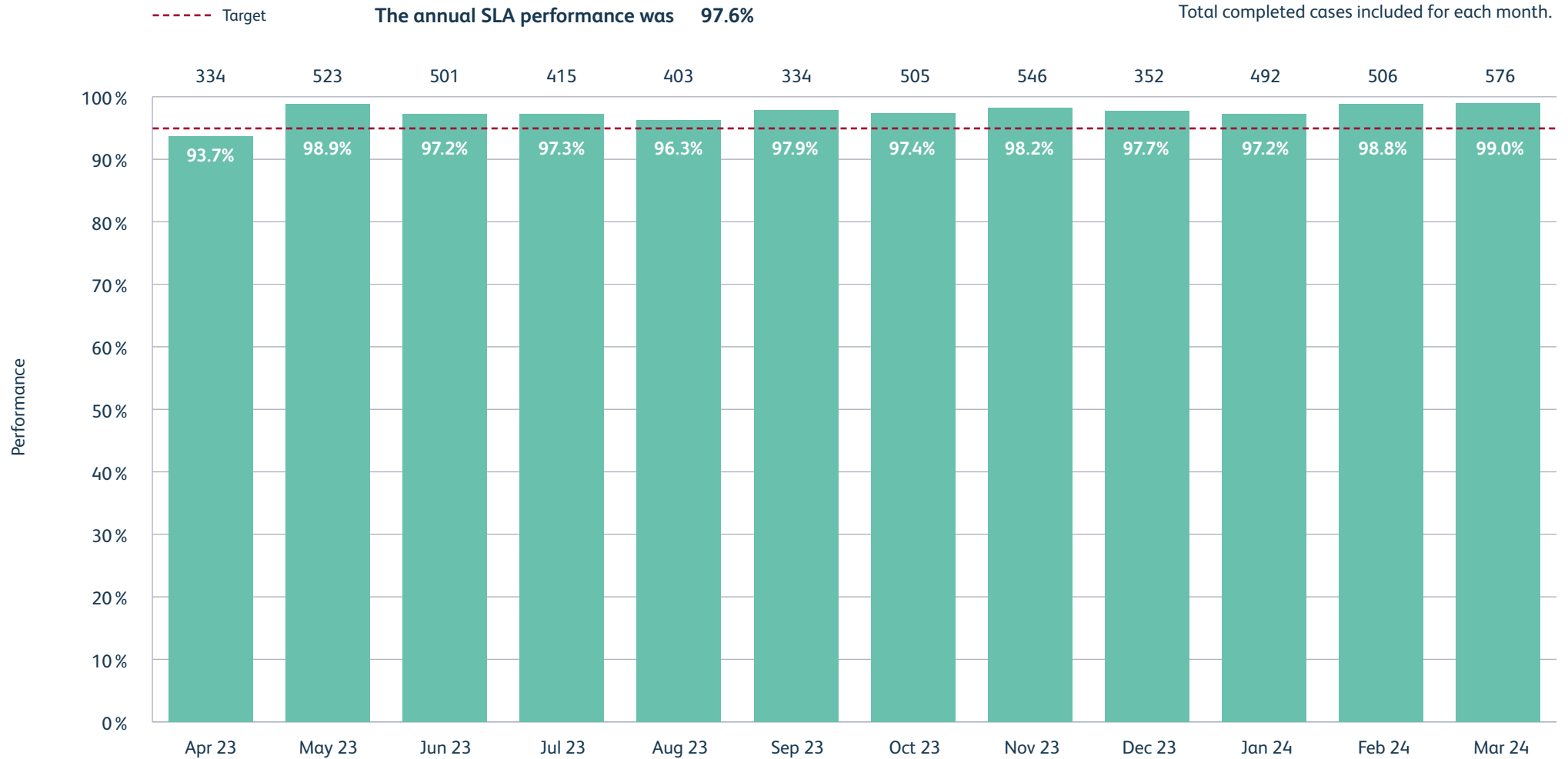
- Performance – All cases
- Performance Standard

CASEWORK PERFORMANCE AGAINST SLA



PERFORMANCE – ALL CASES

CLIENT SPECIFIC



CASEWORK PERFORMANCE AGAINST SLA



PERFORMANCE STANDARD

CLIENT SPECIFIC



CASEWORK PERFORMANCE



ONGOING CASEWORK AT THE END OF THE REPORTING YEAR

CLIENT SPECIFIC

The following table is created by identifying all reportable casework within UPM, and includes those that have subsequently Completed / Aborted / Remain Outstanding within the quarter. The figures in this table cannot be compared to those in the previous slide for a number of reasons including: the table includes aborted cases, but the horizontal bar graph does not; the SLA 'stop trigger' can be actioned before the process has been completed.

	Brought Forward at 01/04/23	Received (Inbound)	Completed (Outbound)	Outstanding as of 31/03/24
New Starters	41	1,009	1,030	20
Transfers In	128	324	310	142
Transfers Out	127	388	351	164
Estimates	15	213	206	22
Deferred Benefits	164	738	604	298
Retirements - Deferred	146	669	734	81
Retirements - Active	128	581	621	88
Refunds	41	397	373	65
Deaths	135	576	561	150
Correspondence	36	405	401	40
Aggregation	123	874	679	318
<i>Other</i>	91	1,180	1,205	66
Total	1,175	7,354	7,075	1,454

Employer Engagement & Communication Activity

In this section...

- Delivered
- Engagement communications

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



DELIVERED – QUARTER 1

ALL LPPA

- Employer training sessions have been delivered with a focus on annual and monthly data returns and navigating the UPM employer portal.
- Automated UPM email notifications went live, confirming to employers when data files have successfully been submitted, and processing has been completed by LPPA.
- Following feedback from employers, improvements have been made to the leaver form in the UPM portal (it is now quicker and more straightforward to complete).
- The online LPPA [retired member newsletter](#) was issued to all email contactable members (and is available to access on the LPPA website), including details on how to access their online P60 in PensionPoint (paper copies issued when requested by members).
- LPPA website updates:
 1. 2023 Spring Budget updates - update on pension increases.
 2. P60 information for retired members.
 3. A new homepage went live on the LPPA Pensions website, to make it easier for members and employers to find relevant information.

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



DELIVERED – QUARTER 2

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](#) – includes Tier 1 and 2 ill health), new [training sessions](#) and an update on [ABS activity](#).

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



DELIVERED – QUARTER 3

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:
 1. [Increasing your pension benefits](#) - provides members with information on taking out an AVC, APC or added pension.
 2. [Age discrimination remedy pages](#) – explaining how members are affected by the McCloud judgement.
 3. New [Forms, documents and scheme information](#) page added.
 4. [GMP page](#) and [Trivial commutation](#) pages added to LPPA website.

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



DELIVERED – QUARTER 4

ALL LPPA

- Monthly return reminder emails have continued to go out to employers, including updates on the [validations process](#) (explaining that ‘Reasons for Leaving’ must be added in the right format when completing their monthly return – this will help reduce the number of individual leaver forms needed in the future).
- A new Retirement section has been added to the LPPA website to help members understand and navigate the retirement process. Key pages that have been updated for members include:
 1. [New retirement landing page.](#)
 2. [LGPS planning for retirement page.](#)
 3. [Early retirement.](#)
 4. [Late retirement.](#)
- [Planning for retirement](#) emails were also sent to active members aged over 55, to signpost them through to the new retirement website section for more information.
- Further LPPA website pages were updated for members, with information provided on [P60s, pension increases and CARE revaluation](#), and [employee contribution rates](#).
- The [50/50 page](#) has also been updated to promote the benefits of staying in the LGPS.
- A [Pension Pulse](#) employer bulletin was produced in February highlighting the key dates for employers to look out for throughout 2024 – also promoting the [employer toolkit](#) and [training schedules](#).
- An additional [Pension Pulse](#) was issued to employers in March, with useful updates on new contribution and APC rates, carer’s leave regulations and CARE revaluation.
- Annual [life certificate emails](#) and letters have been sent to retirees who live outside of the UK.
- The PensionPoint [resources page](#) on the LPPA website has been updated to promote the benefits of PensionPoint and improvements (view service history etc), and [emails](#) have been issued / are planned to increase registration numbers.
- A letter review project has been implemented, with an initial focus on retirement letters. The aim of this project is to make sure letters are jargon-free, easy to understand and support members with the right information at the right time. The project will continue until March 2025.

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- UPM employer portal training was delivered and 7 Havering Pension Fund employers attended.
- Year end training was delivered and 1 employer attended.
- 2 Virtual employer visits were held.
- Absence and Ill Health training was delivered with 2 employers attending.
- 2 employers attended LGPS Scheme Essentials Training.
- Employer Responsibilities training was delivered with 3 employers attending.
- Submitting monthly returns training was delivered and 4 employer attended.
- 5 employers attended Scheme Leavers Training.
- 4 people from Havering employers attended our Employer Forum.
- Monthly member sessions were delivered, with 26 Havering Fund members attending the Making Sense of your Pension sessions and 19 attended Making Sense of your Retirement session.



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