LPP

Local Pensions Partnership
Administration

Ealing Pension Fund

Quarterly Administration Report

1st October - 31st December 2023

lppapensions.co.uk

CONTENTS

DEFINITIONS

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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 - All Cases

Performance is measured once all information is made available to LPPA to enable them to complete the process. Relevant processes are assigned a target timescale for completion, and the performance is measured as the percentage of processes that have been completed within that timescale.

Page 11

Casework Performance - Standard

The category of 'Other' on this page covers processes including, but not limited to:

- APC/AVC Queries
- Additional Conts Cessation
- Change of Hours
- Change of Personal Details
- Under Three Month Opt-Out
- Main to 50/50 Scheme Changes
- Divorce Quotes
- Divorce Settlement
- Ill Health Reviews

Please note that this page includes cases that have met the SLA target, but the stop trigger may also have been actioned before the process has been completed.

Page 12

Ongoing Casework at the end of the Reporting Quarter

Please note the number of processes brought forward, does not match the corresponding number of outstanding processes reported in the previous quarter (due to various reasons which can include; but not limited to, the deletion of a process or changes in assigned categories).

Page 14 & 15

Helpdesk Performance

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

Page 20 & 21

Member Online Portal

The number and percentage of member records by status, that are registered for LPPA's Member Self-Service facility, PensionPoint.

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Common/Scheme Specific Data Fails

The Pensions 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 Scheme Specific 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 Scheme Specific 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.

OUR
VALUES

WORKING TOGETHER

DOING THE RIGHT THING

FORWARD THINKING

COMMITTED TO EXCELLENCE

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

Legend: Active Contributors | Deferred Beneficiaries | Pensioners & Dependants

Quarter	Total	Pensioners & Dependants	Deferred Beneficiaries	Active Contributors
Q4 22/23	26,967	8,024	10,408	8,535
Q1 23/24	27,324	8,056	10,393	8,875
Q2 23/24	27,366	8,110	10,347	8,909
Q3 23/24	27,450	8,172	10,363	8,915
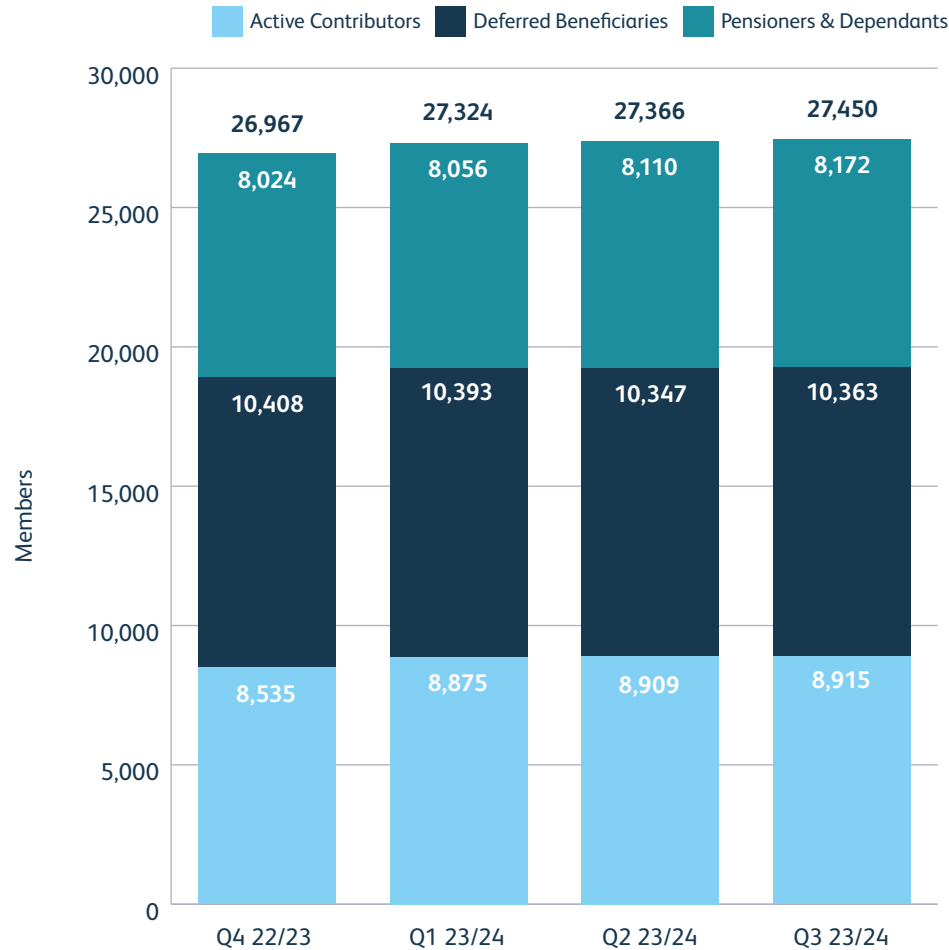
CURRENT AGE DEMOGRAPHIC — CLIENT SPECIFIC

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

Age band	Active	Deferred
Under 21	128	24
21 to 30	1,037	643
31 to 40	1,575	1,759
41 to 50	2,328	2,784
51 to 60	2,604	3,517
61 to 70	1,179	1,435
Over 70	64	201

Legend: Under 65 | 65 to 69 | 70 to 74 | 75 to 79 | 80 to 84 | 85 to 89 | 90 to 94 | 95 to 99 | 100+

Age band	Pensioner
Under 65	1,324
65 to 69	1,754
70 to 74	1,669
75 to 79	1,443
80 to 84	962
85 to 89	659
90 to 94	271
95 to 99	71
100+	19

Casework Performance

In this section…

- Performance – all cases
- Performance standard
- Ongoing casework at end of reporting quarter

CASEWORK PERFORMANCE

PERFORMANCE – ALL CASES   CLIENT SPECIFIC

- - - - - Target   **The quarterly SLA performance was 97.6%**   Total completed cases included for each month.

	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23
Total completed cases	576	533	683	580	584	615	537	566	402	667	860	576
Performance	88.4%	81.8%	91.4%	91.6%	98.5%	96.3%	97.0%	97.2%	97.8%	97.6%	97.3%	97.9%

CASEWORK PERFORMANCE

- - - - Target (95%)

	SLA target (working days)	Total Processed	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	
New Starters	10	439												100.0%
Transfers In	10	86												98.8%
Transfers Out	10	139												98.6%
Estimates	10	68												94.1%
Deferred Benefits	15	96												99.0%
Retirements - Deferred	5	189												95.2%
Retirements - Active	5	172												95.9%
Refunds	5	171												94.7%
Deaths	5	168												92.3%
Correspondence	10	145												99.3%
Aggregation	10	108												98.1%
Other *(see Definitions – page 3)*		322												99.4%
Total		**2,103**												

CASEWORK PERFORMANCE

↘ ONGOING CASEWORK AT THE END OF THE REPORTING QUARTER   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 01/10/23	Received (Inbound)	Completed (Outbound)	Outstanding as of 31/12/23
New Starters	51	400	450	1
Transfers In	267	140	112	295
Transfers Out	263	188	165	286
Estimates	43	55	74	24
Deferred Benefits	576	243	338	481
Retirements - Deferred	184	258	232	210
Retirements - Active	109	232	232	109
Refunds	112	317	321	108
Deaths	194	216	216	194
Correspondence	105	115	157	63
Aggregation	211	233	196	248
Other *(see Definitions – page 3)*	69	424	432	61
TOTALS	2,184	2,821	2,925	2,080

Helpdesk Calls Performance

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

In this section…

- Wait time range
- Calls answered

HELPDESK CALLS PERFORMANCE

WAIT TIME RANGE

CLIENT SPECIFIC

	Under 2 mins	2 to 5 mins	5 to 10 mins	10 to 15 mins	Over 15 mins
Jan 23	22.4 %	14.0 %	17.1 %	19.6 %	26.8 %
Feb 23	32.0 %	12.6 %	13.8 %	10.9 %	30.8 %
Mar 23	43.6 %	15.0 %	17.5 %	9.0 %	14.8 %
Apr 23	56.4 %	21.3 %	15.1 %	3.1 %	4.0 %
May 23	49.1 %	21.3 %	17.1 %	6.9 %	5.6 %
Jun 23	58.5 %	14.8 %	15.2 %	8.1 %	3.4 %
Jul 23	65.0 %	16.1 %	12.6 %	3.0 %	3.3 %
Aug 23	53.0 %	19.7 %	16.0 %	7.3 %	4.1 %
Sep 23	46.4 %	16.1 %	20.4 %	9.3 %	7.9 %
Oct 23	64.1 %	16.0 %	14.7 %	1.9 %	3.3 %
Nov 23	62.0 %	21.0 %	14.4 %	2.3 %	0.2 %
Dec 23	60.5 %	17.5 %	17.5 %	4.1 %	0.3 %
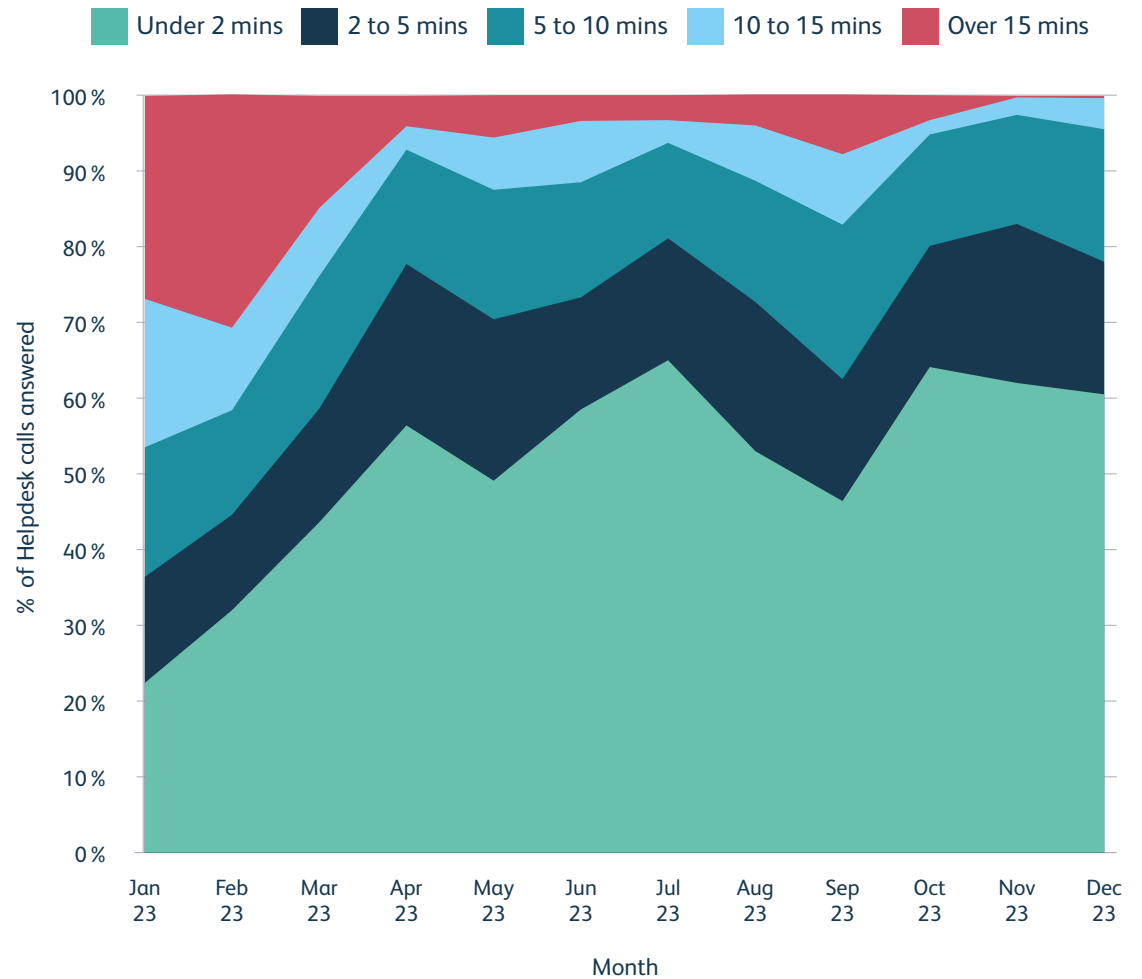
HELPDESK CALLS PERFORMANCE

CALLS ANSWERED   CLIENT SPECIFIC

Average wait time (mm:ss)

Month	Average wait time (mm:ss)	Number of calls	LPPA Abandon Rate
Jan 23	10:15	321	10.6%
Feb 23	10:21	341	10.0%
Mar 23	6:36	399	7.0%
Apr 23	3:07	445	3.8%
May 23	3:58	450	4.6%
Jun 23	3:26	446	3.8%
Jul 23	2:44	492	2.4%
Aug 23	3:48	468	4.1%
Sep 23	4:49	442	5.5%
Oct 23	02:54	482	2.7%
Nov 23	02:19	471	2.0%
Dec 23	02:39	291	2.4%

Month & LPPA Abandon Rate
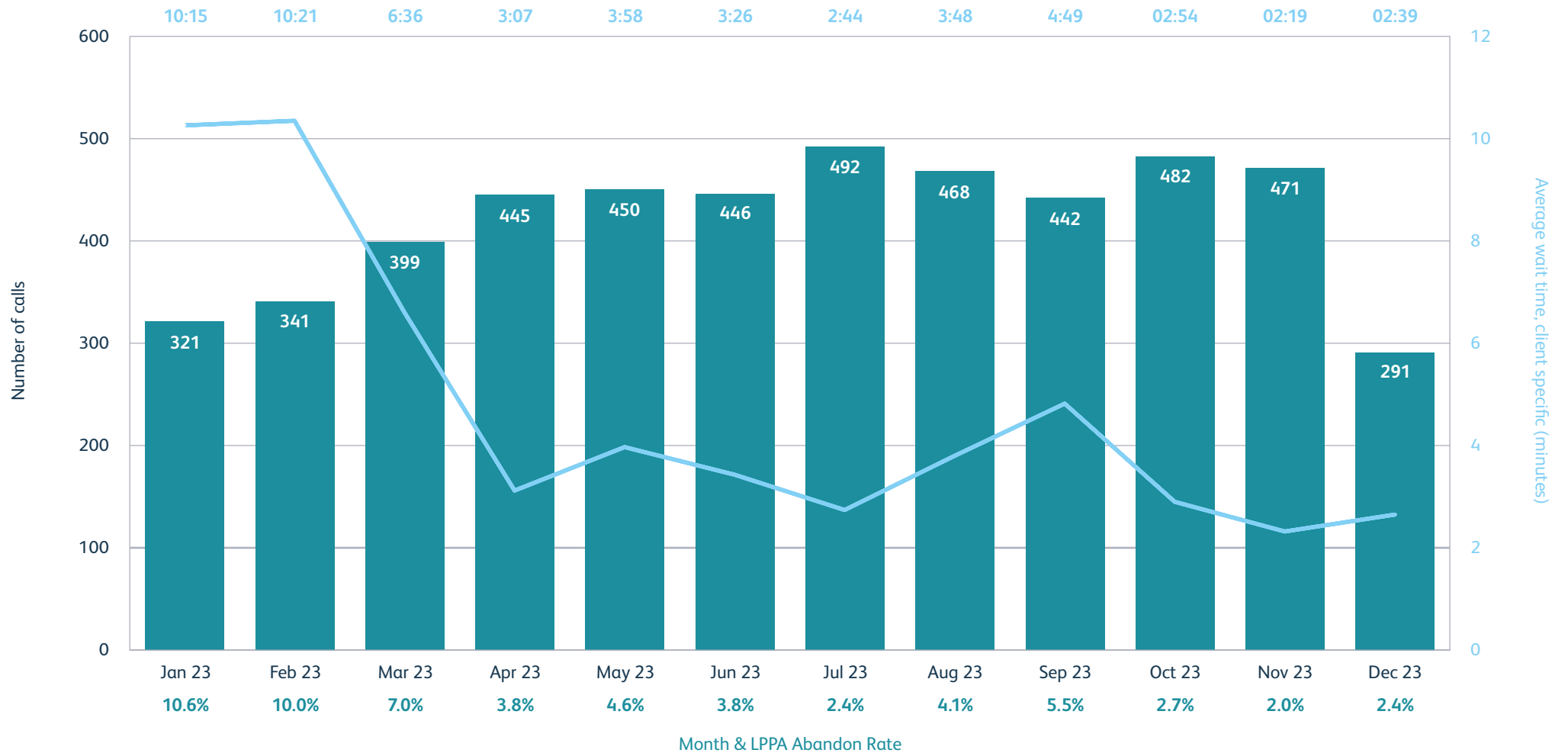
Customer Satisfaction Scores

In this section…

- Helpdesk calls satisfaction
- Retirements

CUSTOMER SATISFACTION SCORES
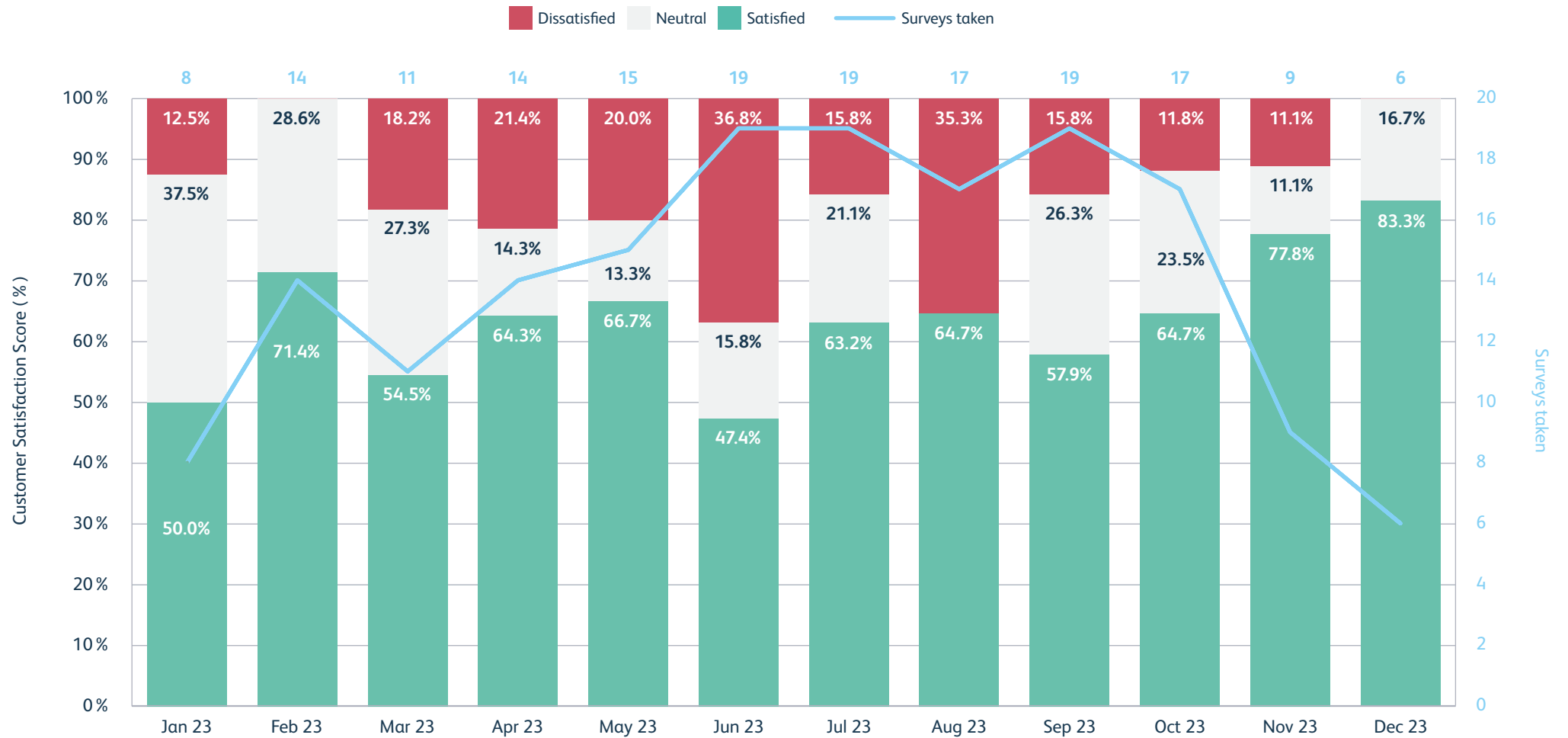
HELPDESK CALLS SATISFACTION CLIENT SPECIFIC

Legend: Dissatisfied | Neutral | Satisfied | Surveys taken

Surveys taken per month: Jan 23: 8, Feb 23: 14, Mar 23: 11, Apr 23: 14, May 23: 15, Jun 23: 19, Jul 23: 19, Aug 23: 17, Sep 23: 19, Oct 23: 17, Nov 23: 9, Dec 23: 6

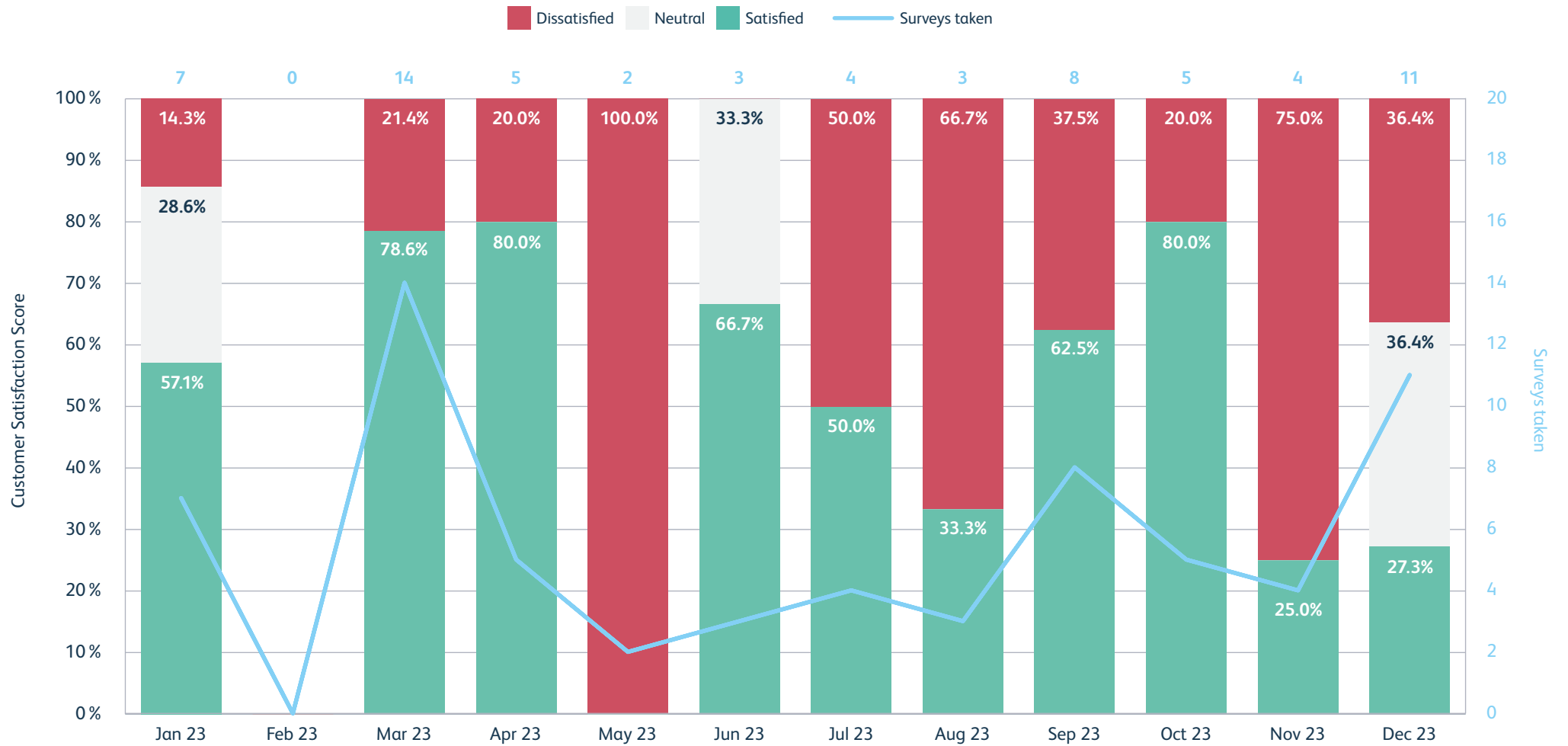| Month	Dissatisfied	Neutral	Satisfied
Jan 23	12.5%	37.5%	50.0%
Feb 23	—	28.6%	71.4%
Mar 23	18.2%	27.3%	54.5%
Apr 23	21.4%	14.3%	64.3%
May 23	20.0%	13.3%	66.7%
Jun 23	36.8%	15.8%	47.4%
Jul 23	15.8%	21.1%	63.2%
Aug 23	35.3%	—	64.7%
Sep 23	15.8%	26.3%	57.9%
Oct 23	11.8%	23.5%	64.7%
Nov 23	11.1%	11.1%	77.8%
Dec 23	—	16.7%	83.3%

CUSTOMER SATISFACTION SCORES

Please note:
Surveys were paused in February and reinstated in March, following a review of the process.
Some surveys were being issued before payment had been made to the member – the timing of the survey has now been updated to correct this.

RETIREMENTS

CLIENT SPECIFIC

Legend: Dissatisfied | Neutral | Satisfied | Surveys taken

Surveys taken (top axis): Jan 23: 7 | Feb 23: 0 | Mar 23: 14 | Apr 23: 5 | May 23: 2 | Jun 23: 3 | Jul 23: 4 | Aug 23: 3 | Sep 23: 8 | Oct 23: 5 | Nov 23: 4 | Dec 23: 11

Month	Dissatisfied	Neutral	Satisfied
Jan 23	14.3%	28.6%	57.1%
Mar 23	21.4%		78.6%
Apr 23	20.0%		80.0%
May 23	100.0%		
Jun 23		33.3%	66.7%
Jul 23	50.0%		50.0%
Aug 23	66.7%		33.3%
Sep 23	37.5%		62.5%
Oct 23	20.0%		80.0%
Nov 23	75.0%		25.0%
Dec 23	36.4%	36.4%	27.3%

Y-axis (left): Customer Satisfaction Score — 0% to 100%
Y-axis (right): Surveys taken — 0 to 20

PensionPoint

Member Online Portal

In this section…

- Total members registered
- Members registered (%)

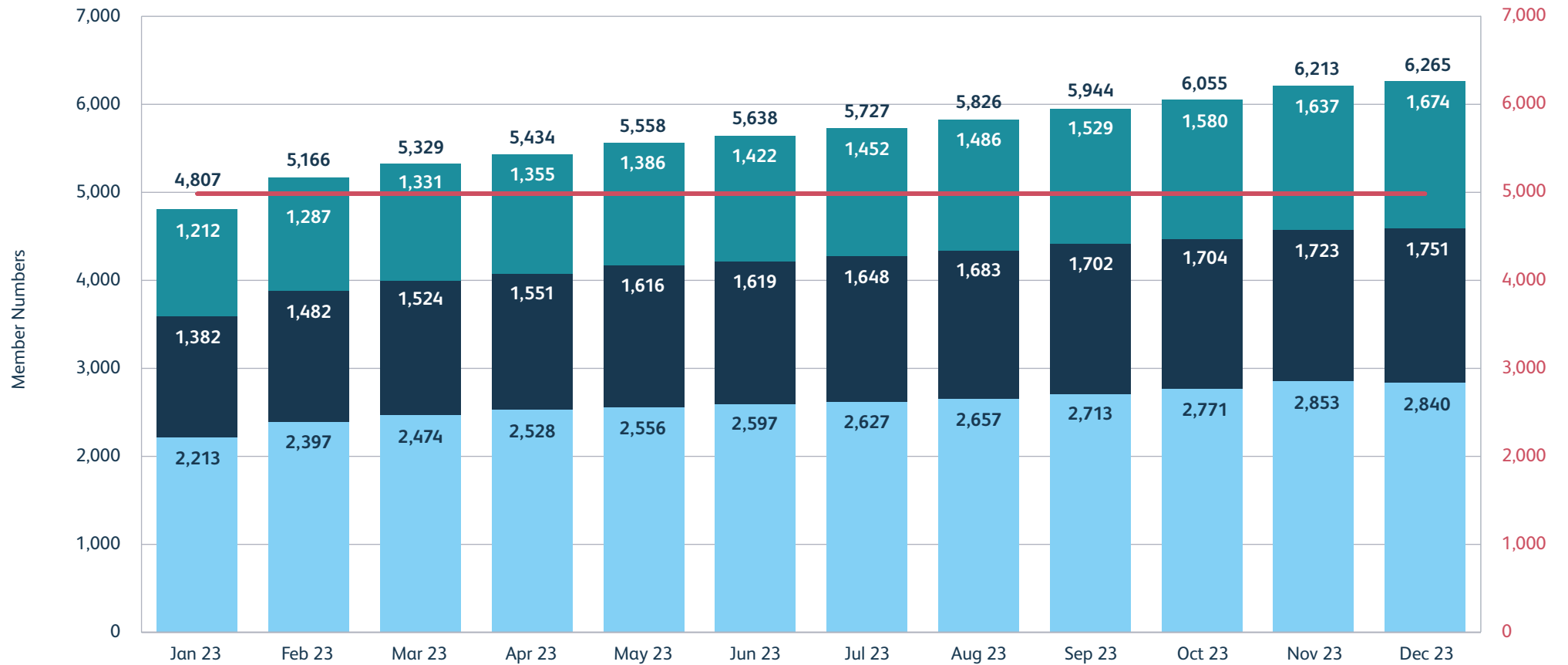# MEMBER ONLINE PORTAL

PensionPoint

TOTAL MEMBERS REGISTERED   CLIENT SPECIFIC

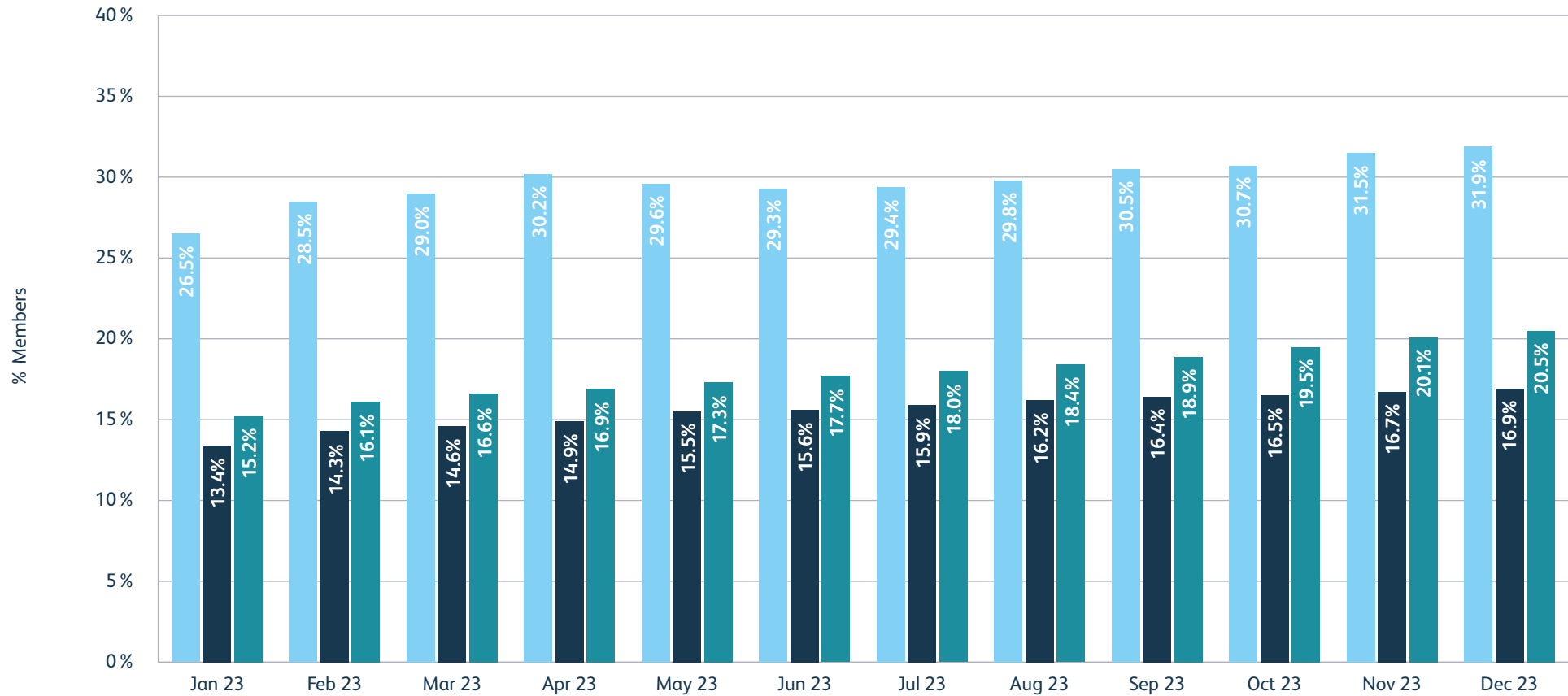Legend: Active | Deferred | Pensioner | ——— 4,980 (previous My Pension Online registrations as of Feb 2022)

Month	Total	Pensioner	Deferred	Active
Jan 23	4,807	1,212	1,382	2,213
Feb 23	5,166	1,287	1,482	2,397
Mar 23	5,329	1,331	1,524	2,474
Apr 23	5,434	1,355	1,551	2,528
May 23	5,558	1,386	1,616	2,556
Jun 23	5,638	1,422	1,619	2,597
Jul 23	5,727	1,452	1,648	2,627
Aug 23	5,826	1,486	1,683	2,657
Sep 23	5,944	1,529	1,702	2,713
Oct 23	6,055	1,580	1,704	2,771
Nov 23	6,213	1,637	1,723	2,853
Dec 23	6,265	1,674	1,751	2,840

Member Numbers (y-axis: 0 – 7,000)

PensionPoint MEMBER ONLINE PORTAL

MEMBERS REGISTERED (%)   CLIENT SPECIFIC

Legend: Active, Deferred, Pensioner

Month	Active	Deferred	Pensioner
Jan 23	26.5%	13.4%	15.2%
Feb 23	28.5%	14.3%	16.1%
Mar 23	29.0%	14.6%	16.6%
Apr 23	30.2%	14.9%	16.9%
May 23	29.6%	15.5%	17.3%
Jun 23	29.3%	15.6%	17.7%
Jul 23	29.4%	15.9%	18.0%
Aug 23	29.8%	16.2%	18.4%
Sep 23	30.5%	16.4%	18.9%
Oct 23	30.7%	16.5%	19.5%
Nov 23	31.5%	16.7%	20.1%
Dec 23	31.9%	16.9%	20.5%

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.

⭲ 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

- 1 virtual visit was held

- 1 Employer attended our Employer Forum

- 5 Ealing Fund members attend a making sense of your pension session and 1 fund member attended a making sense of retirement session

EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

⭸ EMPLOYERS   CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
23 Nov	Ealing Council	Employer Forum	4
21 Nov	Ealing Council	Virtual Visit	5

⭸ MEMBERS   CLIENT SPECIFIC

| Date	Employer	Activity	Number in attendance
24 Oct	All Ealing employers	Making sense of your pension	2
14 Nov	All Ealing employers	Making sense of retirement	1
16 Nov	All Ealing employers	Making sense of your pension	2
16 Nov	Ealing Council	Cost of Living Event	30+
05 Dec	All Ealing employers	Making sense of your pension	1

Data Quality

In this section…

- TPR data scores
- Common data
- Scheme specific data

DATA QUALITY

TPR DATA SCORES

CLIENT SPECIFIC

Legend: Common (dark), Scheme Specific (red)
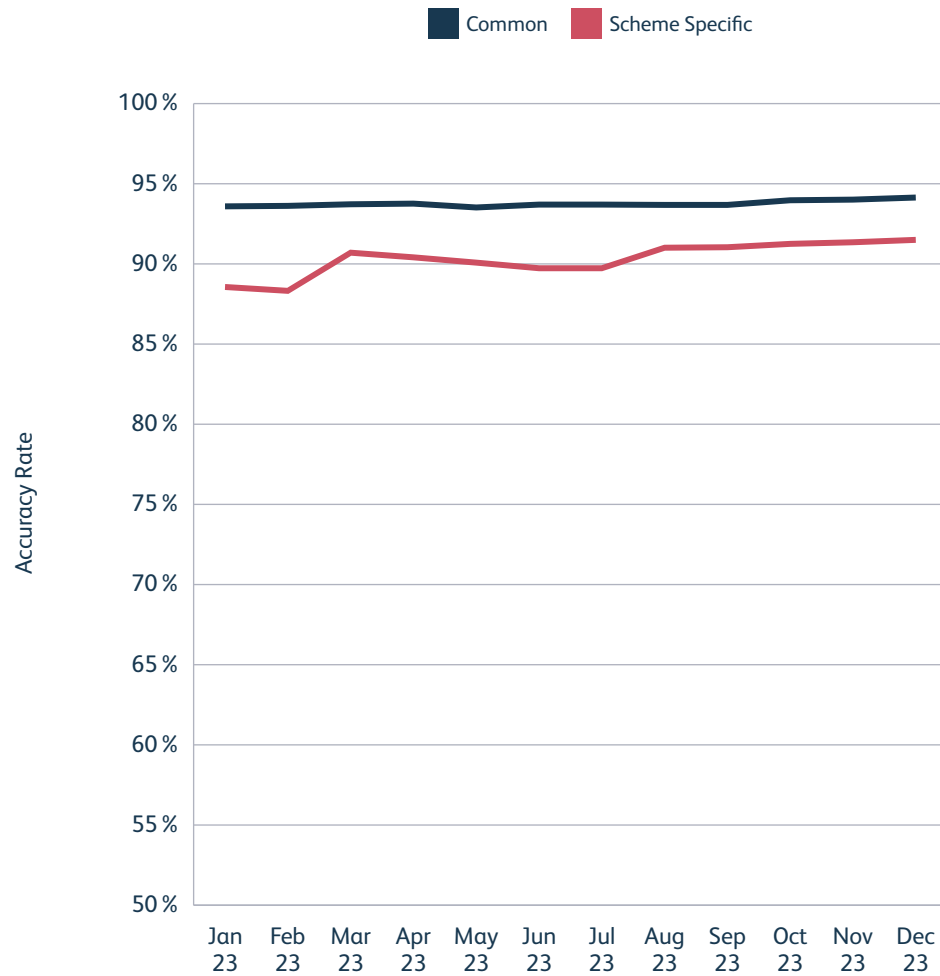
	Common (Target 95%)	Scheme Specific (Target 90%)
Jan 23	93.59%	88.56%
Feb 23	93.62%	88.32%
Mar 23	93.72%	90.70%
Apr 23	93.76%	90.41%
May 23	93.52%	90.08%
Jun 23	93.70%	89.73%
Jul 23	93.70%	89.73%
Aug 23	93.68%	91.01%
Sep 23	93.68%	91.04%
Oct 23	93.97%	91.25%
Nov 23	94.01%	91.35%
Dec 23	94.14%	91.50%

END OF QUARTER DATA QUALITY
(TPR SCORES)

⬂ COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	1	41	13
Duplicate effective date in status history	0	32	13
Gender is not Male or Female	8	0	0
Duplicate entries in status history	36	92	46
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	27	11	0
Missing Surname	0	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	9	0	0
No entry in the status history	2	0	0
Last entry in status history does not match current status	67	11	10
Member has no address	71	1168	15
Missing Forename(s)	0	0	0
Missing State Retirement Date	8	0	0
Missing postcode	68	1184	20
Missing Date Joined Pensionable Service	1	0	0
Total Fails	298	2539	117
Individual Fails	205	1319	85
Total Members	8915	10363	8172
Accuracy Rate	97.7%	87.3%	99.0%
Total accuracy rate			94.1%

⬂ SCHEME SPECIFIC DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	36
AVCs/Additional Contributions	47
Deferred Benefits	1
Tranches (DB)	38
Gross Pension (Pensioners)	2
Tranches (Pensioners)	212
Gross Pension (Dependants)	100
Tranches (Dependants)	152
Date of Leaving	140
Date Joined Scheme	143
Employer Details	1
Salary	131
Crystallisation	91
CARE Data	437
CARE Revaluation	4
Annual Allowance	449
LTA Factors	78
Date Contracted Out	73
Pre-88 GMP	217
Post-88 GMP	574
Total Fails	2,926
Individual Fails	2,334
Total Members	27,450
Accuracy Rate	91.5%

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Local Pensions Partnership
Administration