



# LPP

Local Pensions Partnership  
Administration

Hammersmith & Fulham Pension Fund

## Quarterly Administration Report

1st January – 31st March 2023

[lppapensions.co.uk](http://lppapensions.co.uk)

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# DEFINITIONS

## Page 9

### 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 11

### 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 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 'Member Online Portal' 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 & 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.

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

All figures reported in this section are non-client specific, as not all member calls are dispositioned at client level. This means that call volumes and wait times are not at client level - however, as calls are answered (through our various IVR options) in relation to wait time, performance across all LPPA clients is broadly the same

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 17 & 18

### Customer Satisfaction Scores

The overall Helpdesk and Retirement satisfaction scores includes the percentage of people who provided a satisfied or neutral response.

## Page 20

### Member Online Portal

The number and % of Members that are registered for the Member Online Portal, including a quarterly view.

## Page 29

### 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

✓ COMPLETED    📅 DUE

	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23
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 Q4 2022/23 (January – March 2023)

The second phase of the PACE migration to move to our new pensions administration system is now complete.

To help us manage this significant change programme, we agreed a period of temporary relaxed SLAs for all clients between March – May 2022 and then again between November – January 2023.

The usual overall SLA target is 95 %, and this target was relaxed as follows:

- High priority relaxed SLA for 3-months post go live (relaxed to 90 % target SLA)
- Other cases relaxed SLA for 3-months post go live (relaxed to 70 % target SLA – with the exception of no breach in statutory deadlines, disclosure or a guarantee period)
- Ill-health estimates/retirements prioritised
- Helpdesk call and web form wait times are likely to increase and we will manage this by proactively updating messages on our website, in the IVR when we receive calls and when a web-form is submitted to us

PRIORITY	CASE TYPE
HIGH	Deaths • Retirements deferred • Retirements active
OTHER	New Starters • Refunds • Transfers Out • Transfers In Divorce • Aggregation • Deferred Benefits • Estimates – member Estimates – employer • Correspondence

### Payroll

No disruption to pensioner payroll or lump sum payments (this equates to over £100m, across all clients, in pension payments per month).

### Statutory Deadlines

No statutory deadlines were due during the period.

### Casework SLA Performance

Casework performance for the period was impacted by the final Phase 2 Pace migration, and this migration contained the largest number of clients in a single go live (5 clients). The spikes in work created by the migrations adversely impacts performance. Relaxed SLAs applied through to the end of January to support Pace transition.

As outlined in previous quarterly performance reports, casework performance measures to the end of Q3 from UPM were not directly comparable with how they were measured from the previous system and were in excess of contractual obligations. Significant activity has taken place to ensure that we can measure performance in line with contractual obligations. The Q4 performance report is now measuring performance in line with contractual obligations.

## EXECUTIVE SUMMARY CONTINUED

### Satisfaction Scores

Helpdesk satisfaction scores has reduced slightly during the period. At the end of Q3, satisfaction was 80%, at the end of Q4 satisfaction was 78%.

Retirement satisfaction scores remained the same during the period. At the end of Q3, satisfaction was 64%, at the end of Q4 satisfaction was also 64%. Satisfaction scores have been impacted by the phase 2 migrations and spikes in work which we currently have plans in place to work through.

### Pensions Helpdesk

Helpdesk performance for the period has seen average wait times remain slightly higher, average 9 minutes, than our non-contractual target of 4 minutes. In January the average wait peaked at 10 minutes as performance was adversely impacted by higher call volumes at the start of the month, driving up average wait times.

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



# Fund Membership

## In this section...

- Total Fund membership
- Current Age Demographic

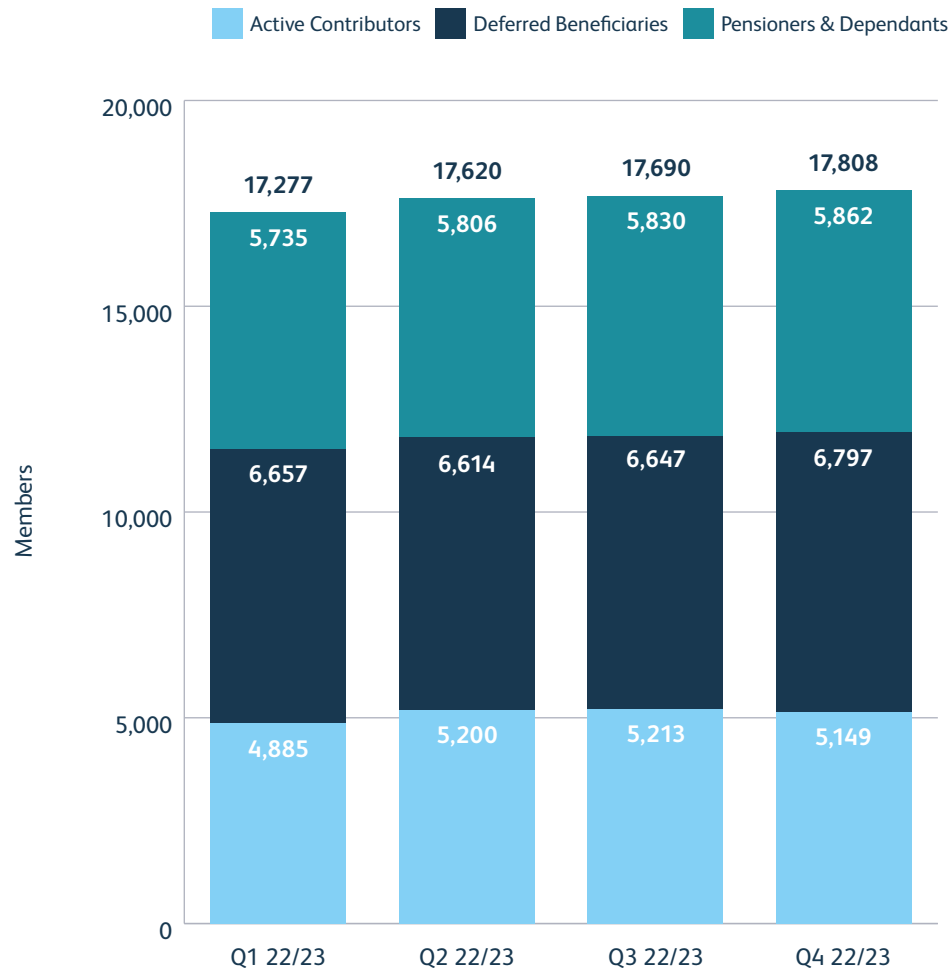


# TOTAL FUND MEMBERSHIP



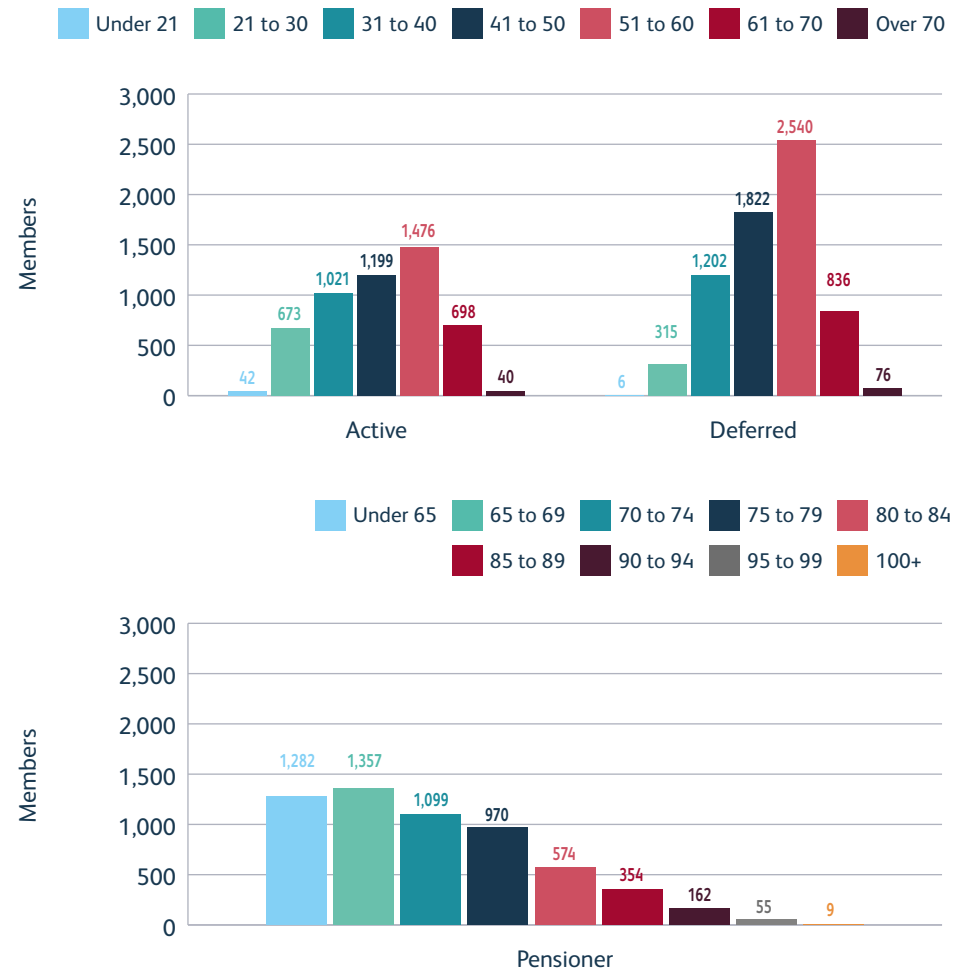
## TOTAL FUND MEMBERSHIP

CLIENT SPECIFIC



## CURRENT AGE DEMOGRAPHIC

CLIENT SPECIFIC



# Casework Performance Against SLA

## In this section...

- Performance – All cases
- Performance Standard

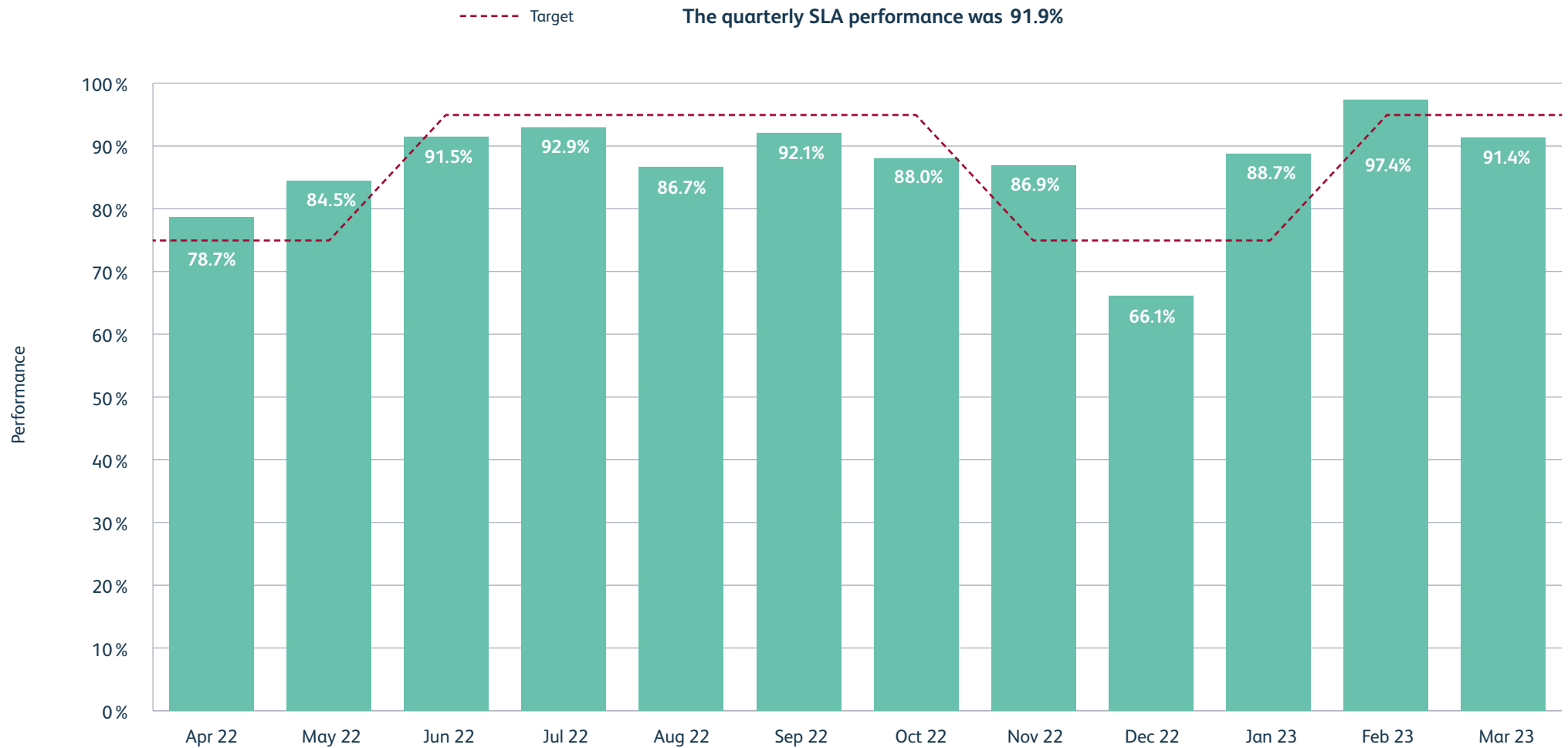
# CASEWORK PERFORMANCE AGAINST SLA

For annual data, please see the **Annual Appendix – page 5**



## PERFORMANCE – ALL CASES

CLIENT SPECIFIC



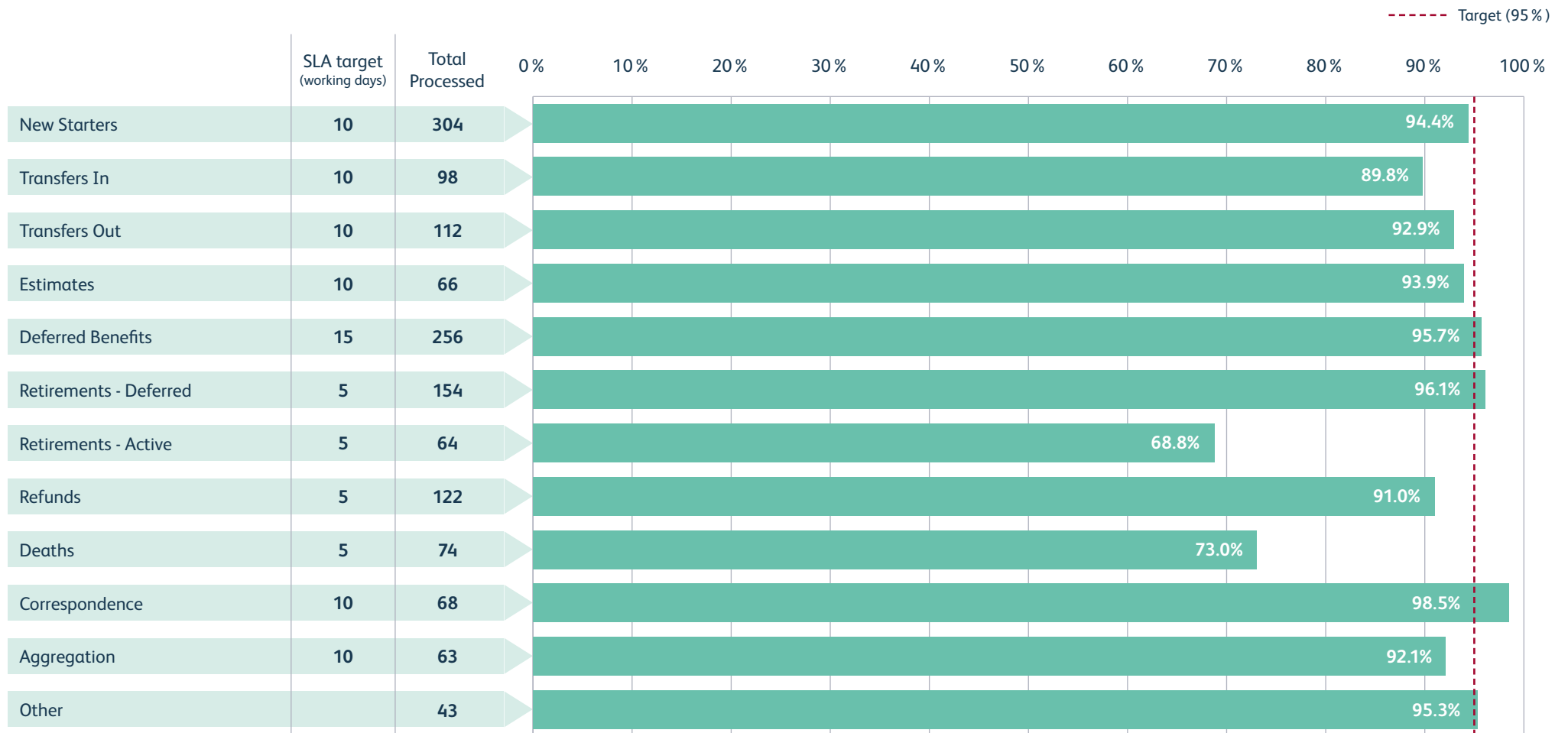
# CASEWORK PERFORMANCE AGAINST SLA

For annual data, please see the **Annual Appendix – page 6**



## PERFORMANCE STANDARD

## CLIENT SPECIFIC



# Helpdesk Calls Performance

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

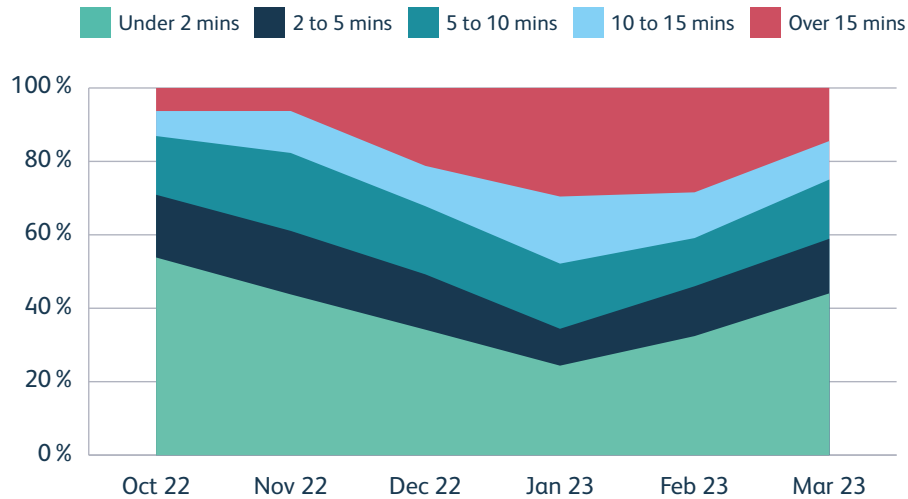
## **In this section...**

- Wait time range
- Calls answered (%)
- Total calls

# HELPDESK CALLS PERFORMANCE

## WAIT TIME RANGE

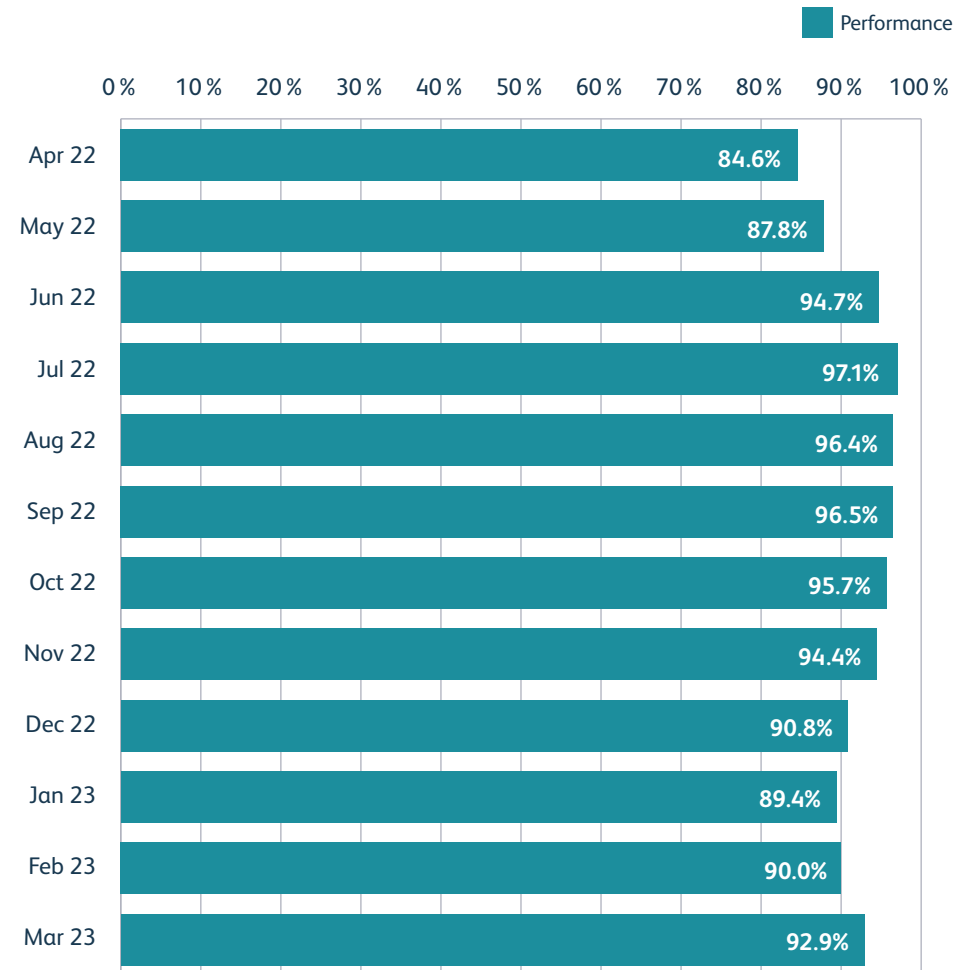
ALL LPPA



	Under 2 mins	2 to 5 mins	5 to 10 mins	10 to 15 mins	Over 15 mins
Oct 22	53.8%	17.1%	16.0%	6.8%	6.3%
Nov 22	43.8%	17.3%	21.2%	11.4%	6.3%
Dec 22	34.2%	15.1%	18.6%	11.0%	21.2%
Jan 23	24.4%	10.0%	17.8%	18.3%	29.6%
Feb 23	32.4%	13.6%	13.1%	12.5%	28.4%
Mar 23	44.1%	14.9%	16.1%	10.5%	14.5%

## CALLS ANSWERED (%)

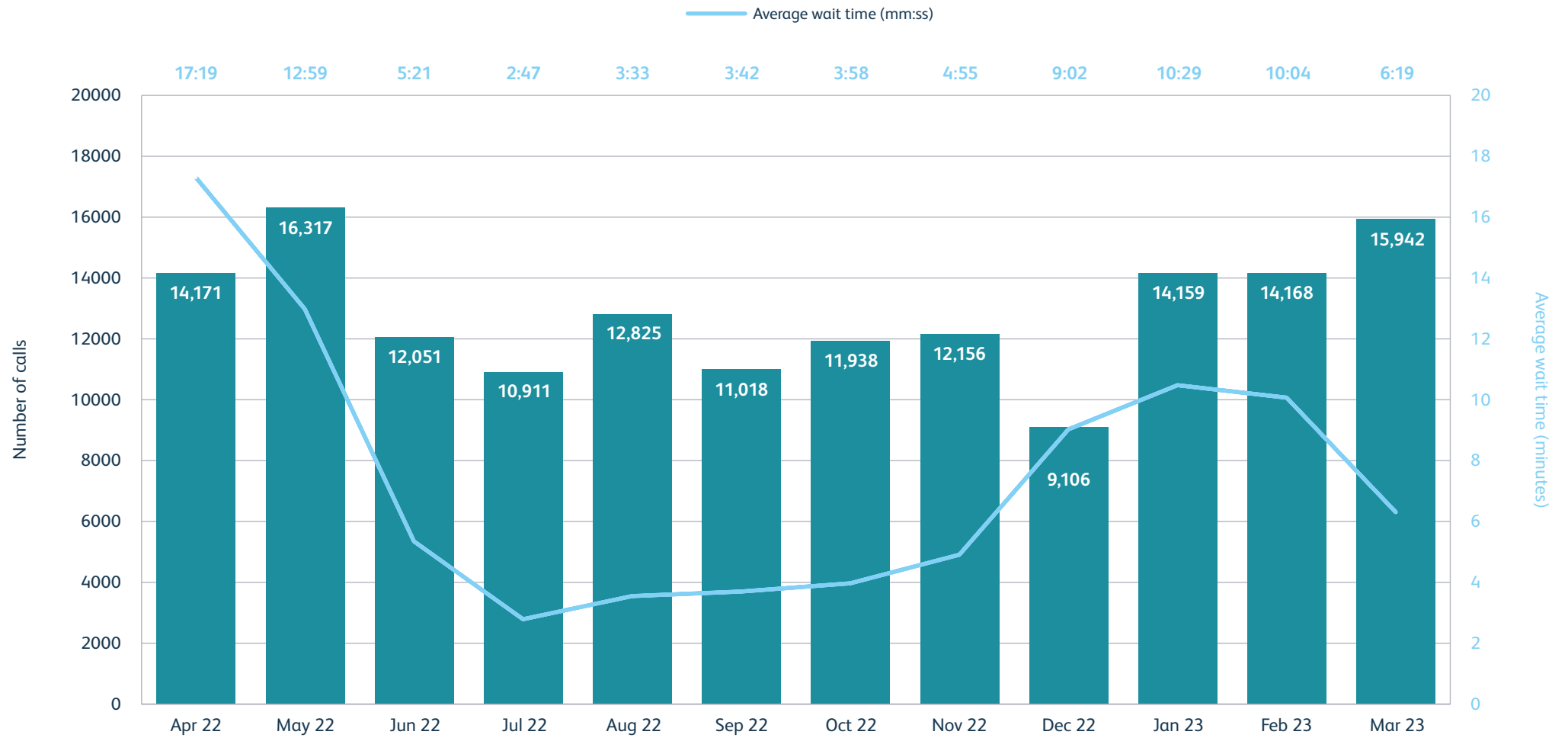
ALL LPPA



# HELPDESK CALLS PERFORMANCE

## ▾ TOTAL CALLS

ALL LPPA



# Customer Satisfaction Scores

## In this section...

- Helpdesk calls satisfaction
- Retirements

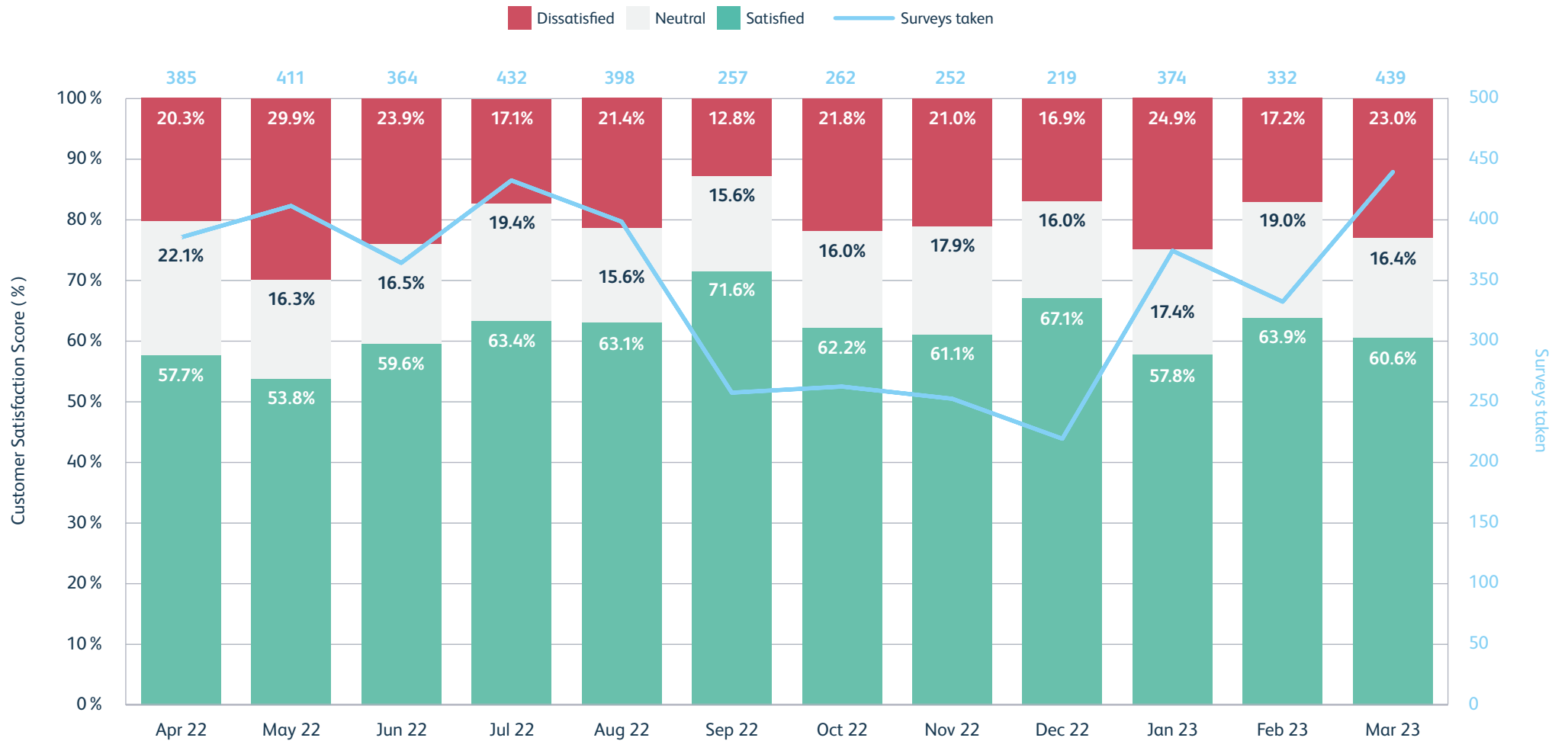


# CUSTOMER SATISFACTION SCORES



## HELPDESK CALLS SATISFACTION

ALL LPPA

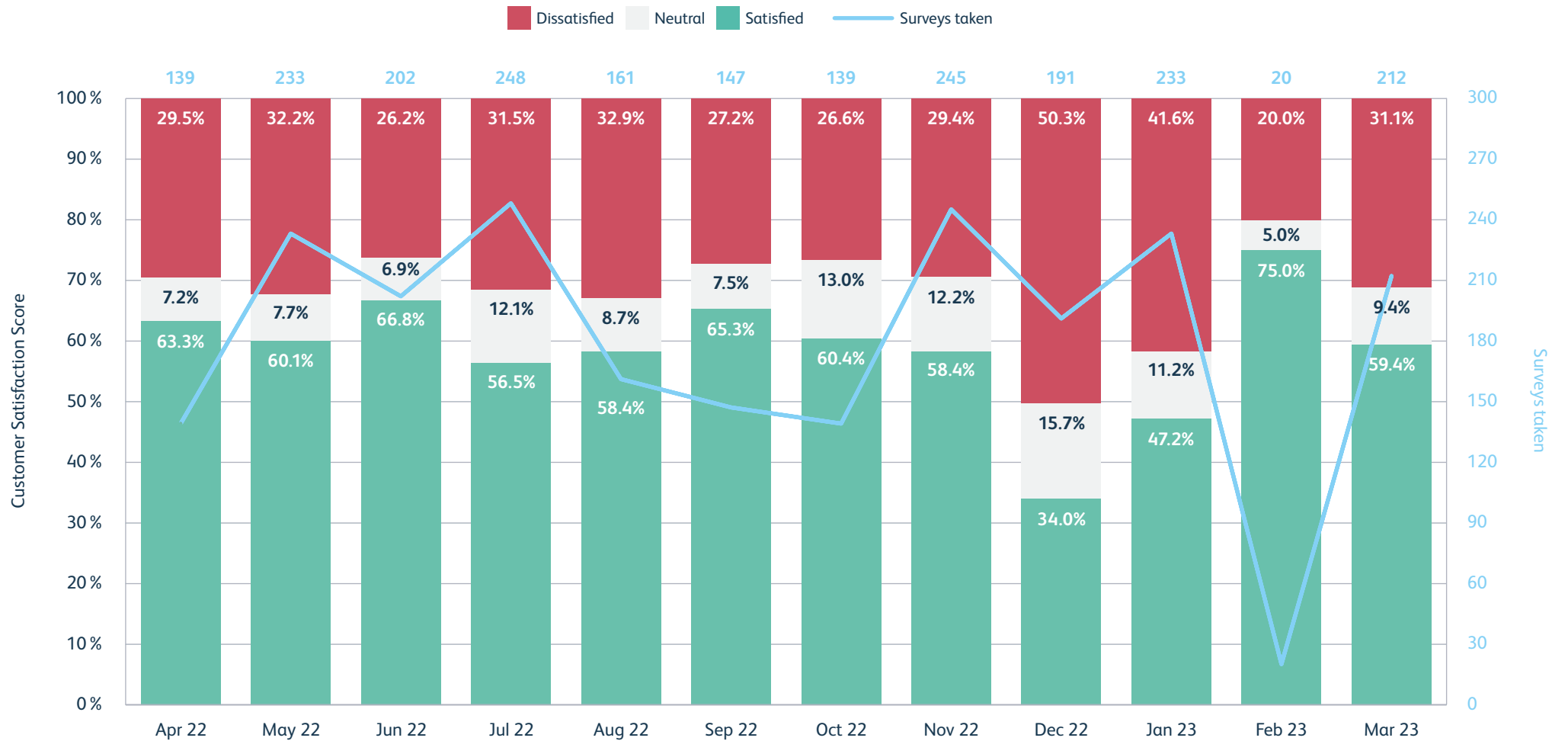


# CUSTOMER SATISFACTION SCORES

**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 ALL LPPA





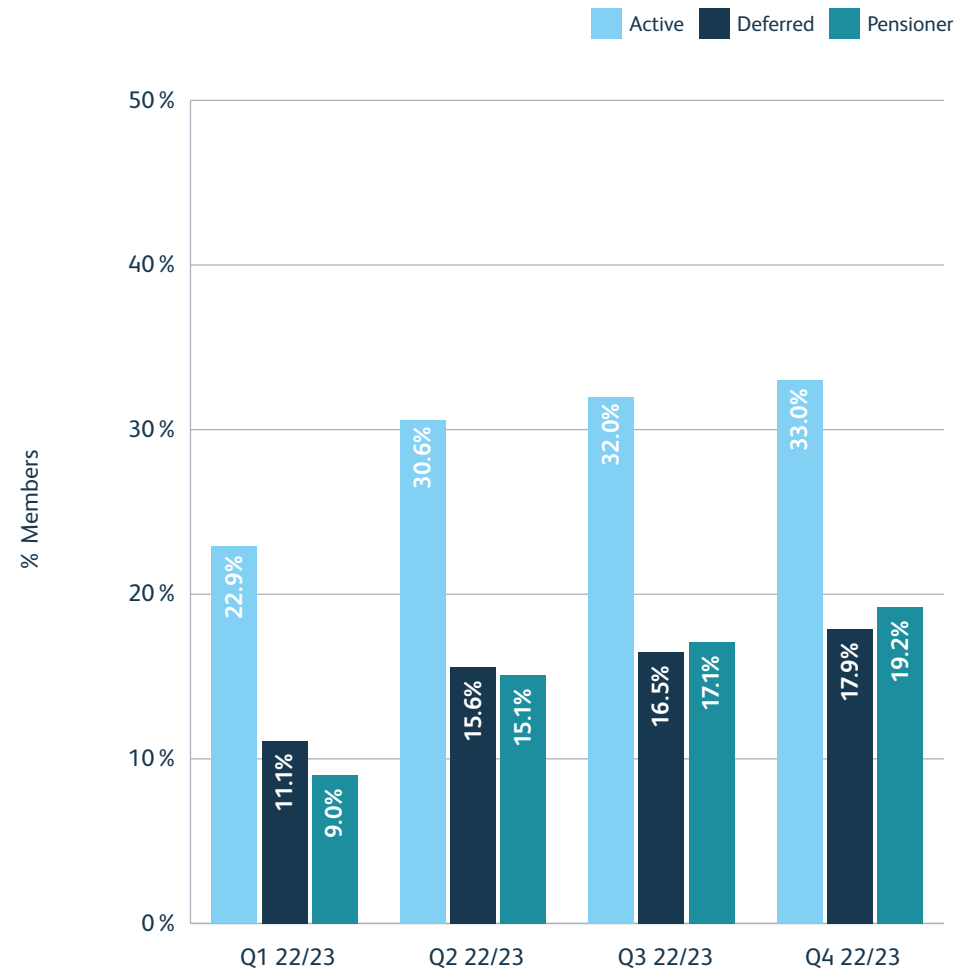
# Member Online Portal

In this section...

- Members registered

MEMBERS REGISTERED

CLIENT SPECIFIC



# Employer Engagement & Communication Activity

## In this section...

- Delivered
- Scheduled
- Engagement communications

For annual data,  
please see the  
**Annual Appendix –  
pages 7-18**

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## DELIVERED

ALL LPPA

1. A [member panel email](#) was issued, asking for feedback on the new LPPA Help Hub, which was launched in December on the LPPA website.
2. Emails, to a cross-section of members from all clients, inviting them to [join the member panel](#) were sent out in January.
3. A pension increases web page was created to update members on the latest pension increases.
4. Further website developments (additional pages) went live in Q4 including:
  - [New Joiners](#)
  - [Member contribution rates \(23/24\)](#)
  - [Additional Pension Contributions \(APC\)](#)
  - [Pension pay dates \(23/24\)](#)
  - [Updating Your Bank Details](#)
  - [Retirement Guide for Leavers](#) (updated)
  - [Tier 3 Ill Health Retirement](#) (updated)
5. In preparation for McCloud remedy, [further communications](#) were issued to fund employers to ensure that historic data submissions have been accurately supplied (specifically hours worked and service break data).
6. A [McCloud roadmap webpage](#) was also created for our clients.
7. [Several bite-sized video FAQs](#) were developed to help answer some of the more popular member questions, including opting out, and information on the 50:50 option.
8. New Frequently Asked Questions (FAQs) were added to the LPPA website, following the Spring Budget, [including updates on Lifetime Allowance \(LTA\) and annual allowance](#). A news story was also added to the [website](#).
9. The automated Helpdesk (recorded) message was updated to include details of how to access P60 documents for retired members (from April).
10. [A joint press release was issued with Civica](#), following the completed switch to the UPM administration platform.
11. LinkedIn posts were issued in Q1 covering a wide range of topics including:
  - Pension health checks
  - LPPA's Cyber Essentials Plus certification
  - Pension increases
  - Safer internet day
  - PensionPoint ('register to enjoy the benefits')
  - Employer Monthly Return training
  - LGBT history month
  - Chinese New Year
  - '100,000' members registered on PensionPoint
  - International Women's Day
  - LPPA Client forum
  - Spring Budget (2023)
  - Monthly Returns

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



DELIVERED CONTINUED

ALL LPPA

- Happy Easter
  - Happy Ramadan
12. [Pension Pulse bulletin](#) – a UPM special was issued to employers in January, followed by a '[financial year end](#)' special in March.
  13. Employer training sessions were delivered with a focus on monthly returns and navigating the UPM employer portal, including:
    - UPM employer portal training (sessions to support with general navigation and submitting the monthly return data file)
    - Monthly Return Training – regular training sessions available for employers to attend, with a demonstration of the upload of Monthly Return file via UPM employer portal.
    - Remote employer visits conducted to support with navigating the UPM employer portal.
    - Employer visits (training sessions and support meetings) continue to be delivered remotely.
  14. Member Sessions were delivered, all bookable via the LPPA Member Training page, including:
    - Making Sense of your Pension (online sessions are aimed at members to help improve their knowledge of their pension, whether they have recently joined the scheme, or have been in the scheme a while).
    - Making Sense of Retirement (sessions are aimed at Members who are reaching retirement age (age 55 and over) to help improve their knowledge of the retirement process and claim their pension).

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## SCHEDULED

ALL LPPA

1. All employers will be required to provide monthly data submissions to LPPA from the 10 May 23 (previously only employers of specific funds supplied monthly data files), and training will continue to be delivered by the engagement team in support of this.
2. P60's will be uploaded to members online accounts (PensionPoint) before the end of May, and email notifications will be issued across the period April to May (paper copies will be mailed to members who have requested them).
3. The LPPA online Spring Newsletter for retired members will be issued around the same time as P60's.
4. ABS notification activity will be planned in Q1, with communications scheduled for delivery in line with statutory deadlines (by the end August).
5. The LPPA online Summer Newsletter for Active and Deferred retired members will be issued around the same time as ABS communications.



# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY



## ENGAGEMENT COMMUNICATIONS

CLIENT SPECIFIC

- 3 Hammersmith and Fulham employers or payroll providers attended Year End Training
- Monthly return training was delivered and 5 employers in attendance across 4 sessions
- 1 employer attended UPM Employer Portal Training
- Scheme Leavers training was delivered and 2 employers attended
- Monthly member sessions were delivered, with 2 Hammersmith and Fulham Pension Fund members attending the Making Sense of your Retirement session and 1 member attending the Making Sense of your Pension session



# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

## EMPLOYERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
17 Jan	LB Hammersmith and Fulham	Submitting Monthly Returns	2
02 Feb	Mortlake Crematorium	Submitting Monthly Returns	1
02 Feb	BT	Submitting Monthly Returns	1
22 Feb	BT	Submitting Monthly Returns	1
02 Mar	Sacred Heart School	Submitting Monthly Returns	1
02 Mar	Urban Partnership Group	Submitting Monthly Returns	1
07 Mar	Sacred Heart School	UPM Employer Portal	1
09 Mar	Urban Partnership Group	Scheme Leavers	1
09 Mar	BT	Scheme Leavers	1
21 Mar	Sacred Heart School	Submitting Monthly Returns	1
23 Mar	LB Hammersmith and Fulham	Year End training	2
23 Mar	Prospects	Year End training	2
23 Mar	HR Connect	Year End training	1

## MEMBERS

CLIENT SPECIFIC

Date	Employer	Activity	Number in attendance
06 Mar	H&F Pension Fund Members	Making sense of your pension	1
09 Mar	H&F Pension Fund Members	Making sense of retirement	2

# EMPLOYER ENGAGEMENT & COMMUNICATION ACTIVITY

For annual data, please see the **Annual Appendix – pages 17 & 18**

## EMAILS – EMPLOYERS

CLIENT SPECIFIC

### January

- Pension Pulse (UPM Special)
- Monthly data returns training

### March

- Annual returns / Important information on 2022 / 23 submissions (Reminder)
- Pension Pulse
- McCloud Data Collection (first)
- McCloud data file collection (follow up)

## EMAILS – MEMBERS

CLIENT SPECIFIC

### January

- Member training - Making Sense of Your Pension / Retirement

### February

- Member panel / News Hub (small selection across multiple funds)

### March

- Member panel / invitation (small selection across multiple funds)

# Data Quality

## In this section...

- Common data
- Conditional data

# DATA QUALITY (TPR SCORES)

## COMMON DATA

CLIENT SPECIFIC

Data Item	Active	Deferred	Pensioner / Dependant
Invalid or Temporary NI Number	6	21	20
Duplicate effective date in status history	5	23	14
Gender is not Male or Female	0	0	0
Duplicate entries in status history	17	28	16
Missing (or known false) Date of Birth	0	0	0
Date Joined Scheme greater than first status entry	10	8	1
Missing Surname	0	0	0
Incorrect Gender for members title	0	0	0
Invalid Date of Birth	5	0	0
No entry in the status history	3	0	0
Last entry in status history does not match current status	23	13	12
Member has no address	47	801	95
Missing Forename(s)	0	0	0
Missing State Retirement Date	0	0	0
Missing postcode	47	828	135
Missing Date Joined Pensionable Service	3	0	0
<b>Total Fails</b>	<b>166</b>	<b>1,722</b>	<b>293</b>
<b>Individual Fails</b>	<b>107</b>	<b>880</b>	<b>182</b>
<b>Total Members</b>	<b>5,149</b>	<b>6,797</b>	<b>5,862</b>
<b>Accuracy Rate</b>	<b>97.9%</b>	<b>87.1%</b>	<b>96.9%</b>
<b>Total accuracy rate</b>	<b>93.4%</b>		

## CONDITIONAL DATA

CLIENT SPECIFIC

Data Item	Fails
Divorce Records	0
Transfer In	40
AVC's/Additional Contributions	45
Deferred Benefits	18
Tranches (DB)	30
Gross Pension (Pensioners)	30
Tranches (Pensioners)	188
Gross Pension (Dependants)	10
Tranches (Dependants)	25
Date of Leaving	430
Date Joined Scheme	441
Employer Details	2
Salary	486
Crystallisation	425
Annual Allowance	886
LTA Factors	117
Date Contracted Out	98
Pre-88 GMP	552
Post-88 GMP	516
<b>Total Fails</b>	<b>4,339</b>
<b>Individual Fails</b>	<b>3,256</b>
<b>Total Members</b>	<b>17,808</b>
<b>Accuracy Rate</b>	<b>81.7%</b>

# LPP

Local Pensions Partnership  
Administration