



# LPP

Local Pensions Partnership  
Administration

## Data project



# Objectives

The project has the following objectives:

- Embed the data auditing tool into day-to-day operations
- Implement accurate, manageable and accepted ways to measure data quality
- Create data improvement (remediation) plans, along with mechanisms for their ongoing management in BAU
- Develop criteria for prioritisation within data remediation plans
- Identify root causes of existing data issues and provide process/system fixes to support the BAU data quality maintenance
- Future proof current data processes by defining and implementing controls over data entry points, to prevent degradation of data quality
- To enable bulk processes, automation, self-service and day to day calculations to run without data validation/integrity issues



# Anticipated benefits

The following benefits are being envisaged through delivery of this project:

## **To members**

1. Improved data quality allowing administration of member payments and other administration to be more accurate and efficient, therefore improving the member experience
2. Will enable automated and self-service functionality to work effectively – making processing quicker and easier for the member to complete forms
3. Data accuracy within Pensions Dashboards will enhance member accuracy

## **To clients & employers**

1. Supports adherence to timelier and quality regulatory requirements, for example ABS, Pensions Dashboards, valuation and more
2. Enables improvements to submission of monthly data returns
3. Will enable automated and self-service functionality to work effectively
4. Improvement on regulatory TPR scores

## **To LPPA**

1. Improved member experience, enabling LPPA to utilise new automation and self-service through improved data quality whilst reducing external queries, regulatory risk and administrative effort
2. Automated and self-service functionality working effectively will create capacity across operations to focus on more value-add activity
3. Supports identification of process and training requirements to improve wider administration strategy



# The 4 phases of the data project

## Phase 1: Data audit (Complete)

- Identify the set of data to be continually monitored
- Understand the Data Validation Checks (DVCs) being performed to maintain data integrity

## Phase 2: Forensic analysis (Complete)

- Create a cleanse report of data audit findings
- Perform forensic analysis of data audit findings
- Categorise data errors by employers
- Perform trend analysis
- Review sample members
- Identify systemic data issues
- Assessment of potential bulk solutions
- Root cause analysis of systemic data validation failures (DVs)

## Phase 3: Data resolution (Now started)

- Complete bulk automated cleansing
- Determine efficient use of resources for manual data cleansing

## Phase 4: Data maintenance (Now started)

- Identify emerging issues as soon as possible
- Highlight members at highest risk of incorrect benefits due to poor data when approaching a member event
- Facilitate the development of periodic cleanse plans





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# Efficiency & Service Improvement Programme (ESIP) - update

# Retirement Journey Improvements

As part of LPPA's Efficiency and Service Improvement Programme (ESIP), the business has focussed on improvements to the retirement journey for members.

All stages of the retirement process have been improved:

**Leaver Notifications**

**Quotation Stage**

**Member  
Forms**

**Payment Stage**

Some changes are already in place, others are in progress, with the remainder scheduled for 2025-26.

## Speed

Fastest Retirement Quotation in 48 seconds

## Capacity for value add

Created additional time and capacity for staff to enhance service standards

## Volume

Over 2,800 Retirement Quotations sent in under 5 minutes

## Satisfaction

Higher satisfaction feedback from members who have benefited from automation

# Benefits to member journey

1

End-to-end  
elapsed time  
reduced by 64%  
vs manual cases

2

Complete  
retirement  
journey possible  
in 24 hours

3

68% of Deferred  
Retirement  
Quotations now  
automated





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## Regulatory Change – McCloud & Pensions Dashboard



## McCloud Remedy

Release dates for LGPS remedy functionality, including the new ABS that includes the Deferred Choice Underpin, have been agreed with Civica and are scheduled for the end of May 2025.

### **Data**

- The data project has identified member records which require cleansing before remedy can be applied by October 2025. Data cleanse plans have been formulated and are currently being worked through.

### **Deferred Choice cases (those whose benefits are coming into payment now)**

- Current position for those retiring now – the underpin applies for member data that has been validated; where data hasn't been validated, we will revisit those cases (in bulk) when UPM functionality is delivered this year. To date, across all the LGPS Funds that we work with, 1,130 underpin calculations have been completed since April 2024. 51 calculations have resulted in the underpin being applied which has resulted in an average annual increase to the pension of £280 per annum. For H&F members specifically, 28 underpin calculations of which 2 members are better off, the first resulting in an annual increase to pension of £522.02p.a. and the second £16.97p.a.

### **Immediate Choice cases (retrospective cases – benefits are already in payment)**

- No immediate choice cases have been processed to date. Further UPM releases are expected May 2025 to support the retrospective work. During Q1 we will identify the no. of members who require a remedy calculation and will provide a plan and timescales for how we will complete this activity by the October 2025 deadline.

## Pensions Dashboard

- Engagement with AVC providers and Funds on data integration continues.
- Full Business Readiness assessment continues.
- Civica development is ongoing (Civica are LPPA's Integrated Service Provider for connection to the dashboard ecosystem).
- Client roundtables continue to be delivered every 6-8 weeks

