

your
pension
service

CUMBRIA PENSION FUND

Annual Performance Report

1 April 2019 to 31 March 2020

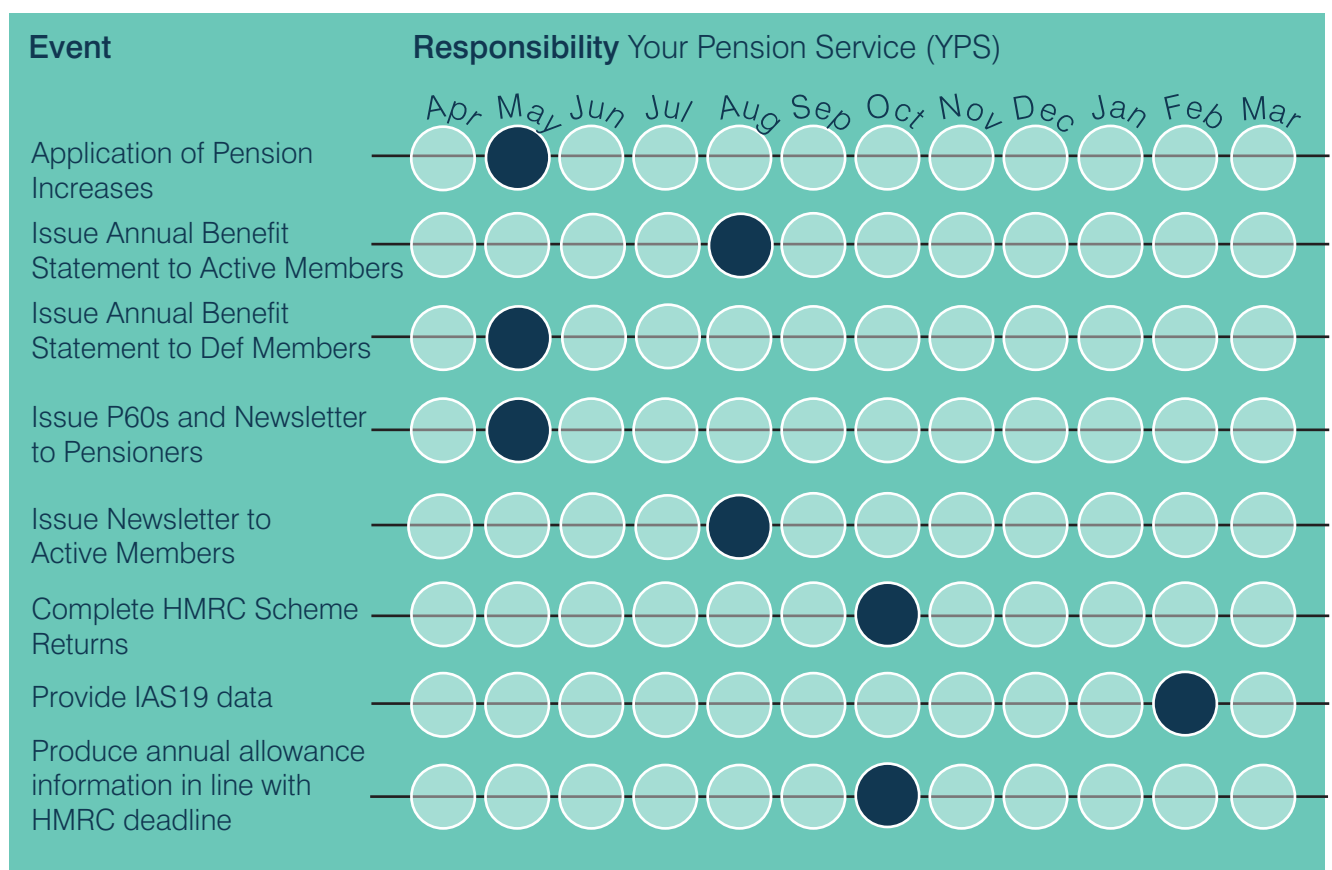


1. INTRODUCTION

This report sets out the performance of Your Pension Service against agreed targets. This report covers the period 1 April 2019 to 31 March 2020.

Annual Plan – 2019/20

● Due ● Completed



2. PERFORMANCE STANDARDS

LGPS

Service Level Agreements

The SLA performance reported in this document is based on the types of cases detailed below. However, LPP also process other case types for members of the scheme which are outlined in the SLA or are critical to providing the pensions administration service. Overall performance against all case types was 97%.

Caseload and Performance Levels:



Target Hit



Target Miss

LGPS

Performance Standard

Estimate benefits within 10 working days

Cases
Bf & Rec

2,275

Cases
completed

2,252

Within
SLA

2,125

% Within
SLA

94%

Target

95%

Cases ongoing

23

Payment of retirement benefits within 10 working days

2,040

1,780

1,706

96%

95%

260

Payment of death benefits within 10 working days

1,127

965

929

96%

95%

162

Implement change in pensioner circumstance by payment due date

186

186

185

99%

95%

0

Respond to general correspondence within 10 working days of receipt

954

944

916

97%

95%

10

Action transfers out within 15 working days

945

899

890

99%

95%

46

Action transfers in within 10 working days

937

749

737

98%

95%

188

Pay refunds within 10 working days

2,152

2,083

2,030

97%

95%

69

Provide leaver statement within 15 days

3,525

2,893

2,817

97%

95%

632

Amend personal records within 10 working days

3,649

3,646

3,646

100%

95%

3

17,790

16,397

15,981

97%

1,393

Please see table below for a breakdown of cases outstanding:

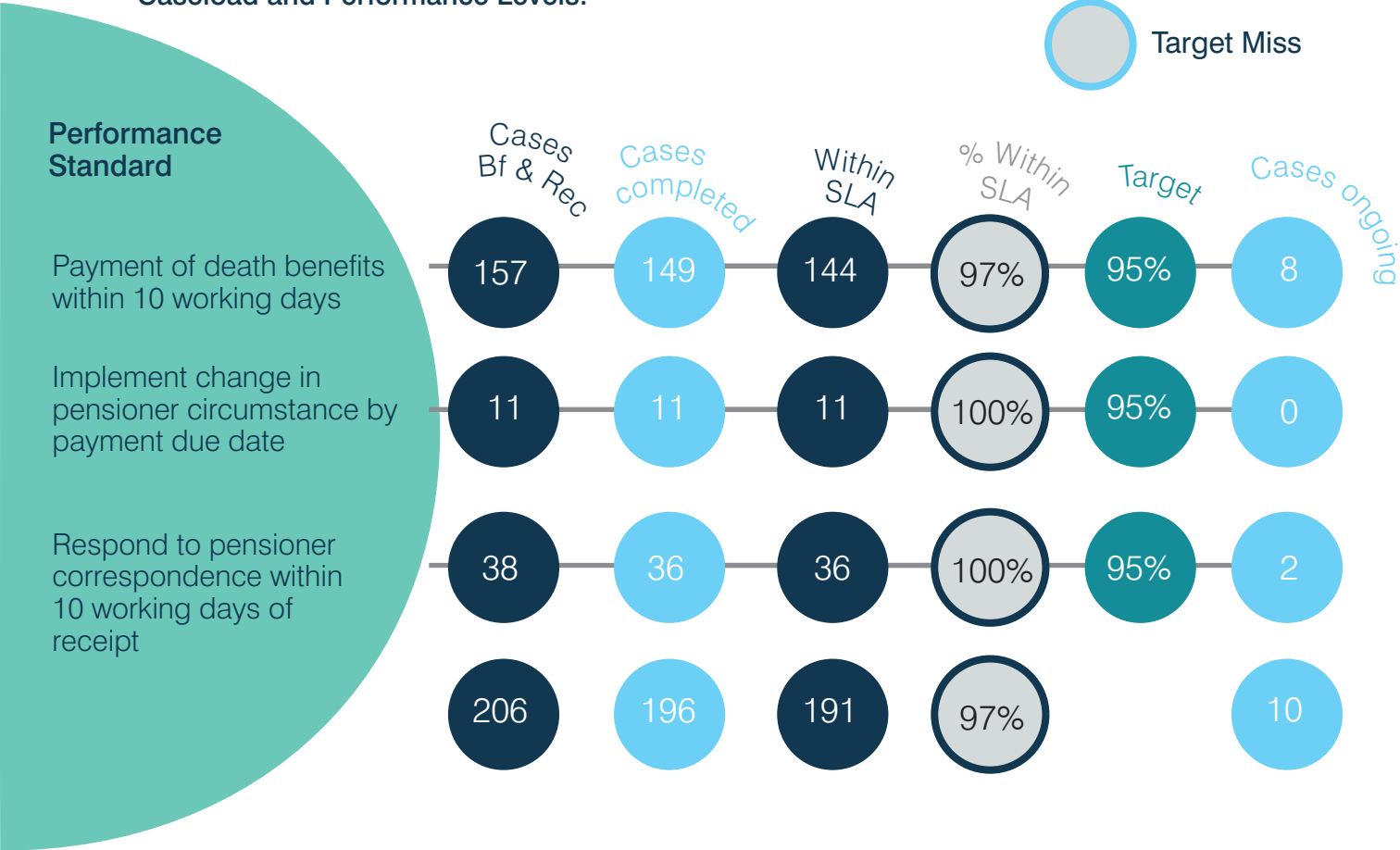
Reason	Payment of Retirement Benefits	Payment of Death Benefits	Total of Cases Ongoing
In progress (LPP can progress)	124	67	813
Awaiting member	96	43	180
Awaiting employer	33	5	254
Awaiting third party	7	47	146
Total	260	162	1,393

Cases processed and performance standards for Teachers and Fire are shown on the following pages.

Teachers (Pensioners)

In summary 196 individual calculations/enquiries were completed during the period and 191 met the performance standard; an overall performance of 97% was achieved.

Caseload and Performance Levels:



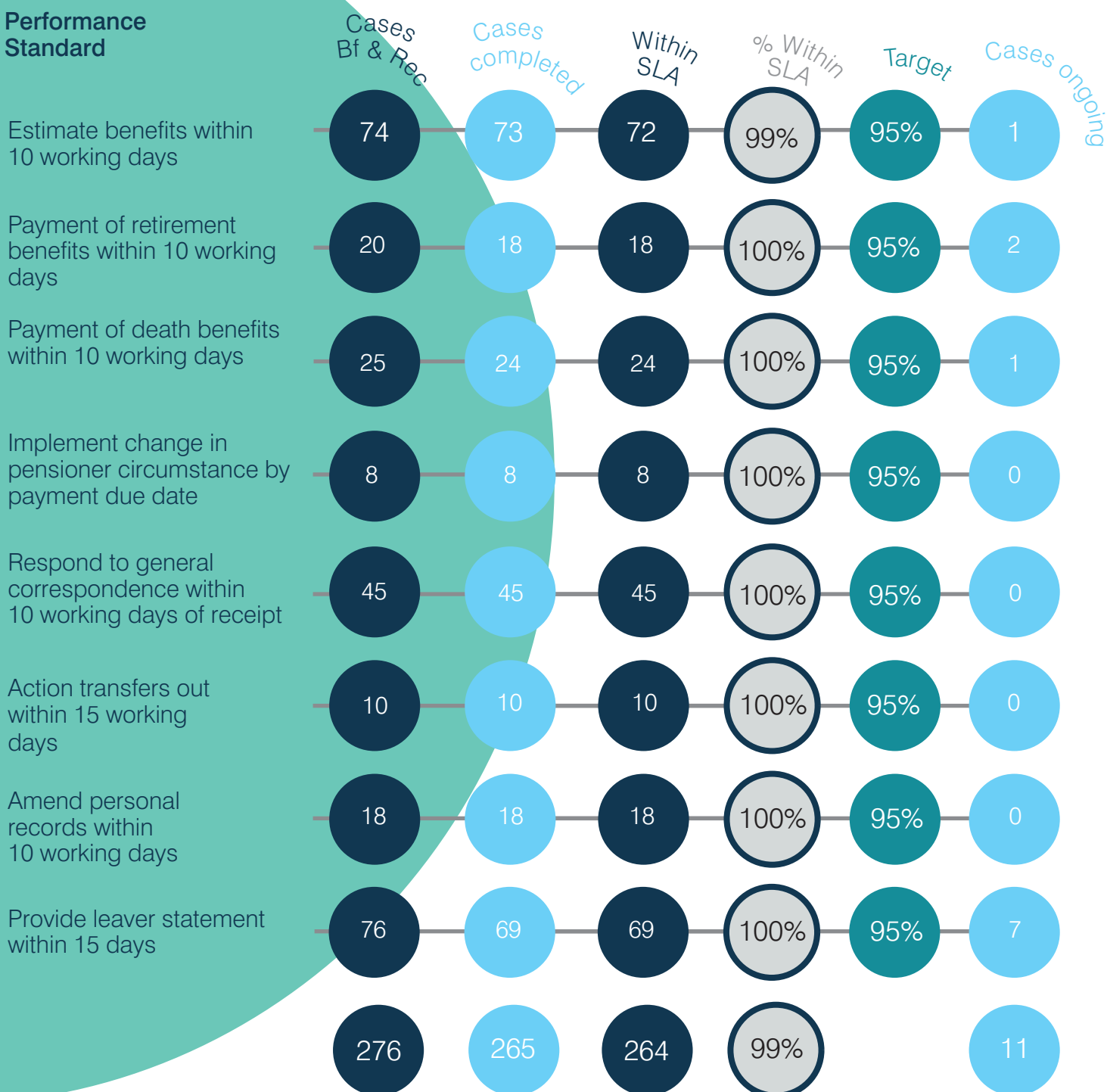
Fire (Old and New Scheme)

In summary 265 individual calculations/enquiries were completed during the period and 264 met the performance standard; an overall performance of 99% was achieved.



Caseload and Performance Levels:

Performance Standard



3. MEMBERSHIP

The tables below show details of membership under administration as of 31 March 2019 to 31 March 2020.

LGPS

	Membership at 31.03.2019	Net Changes	Membership at 31.03.2020
Active	16,453	+536	16,989
Deferred	25,202	-782	24,420
Pensioner	16,185	+802	16,987
Total	57,840	+556	58,396

As at 31 March 2020, there were 1,586 pending leavers within the fund of those we have received 679 leaver forms. The membership numbers above assume that all of these pending leavers will become deferred members once the records have been updated.

My Pension Online

Total membership currently signed up to My Pension Online

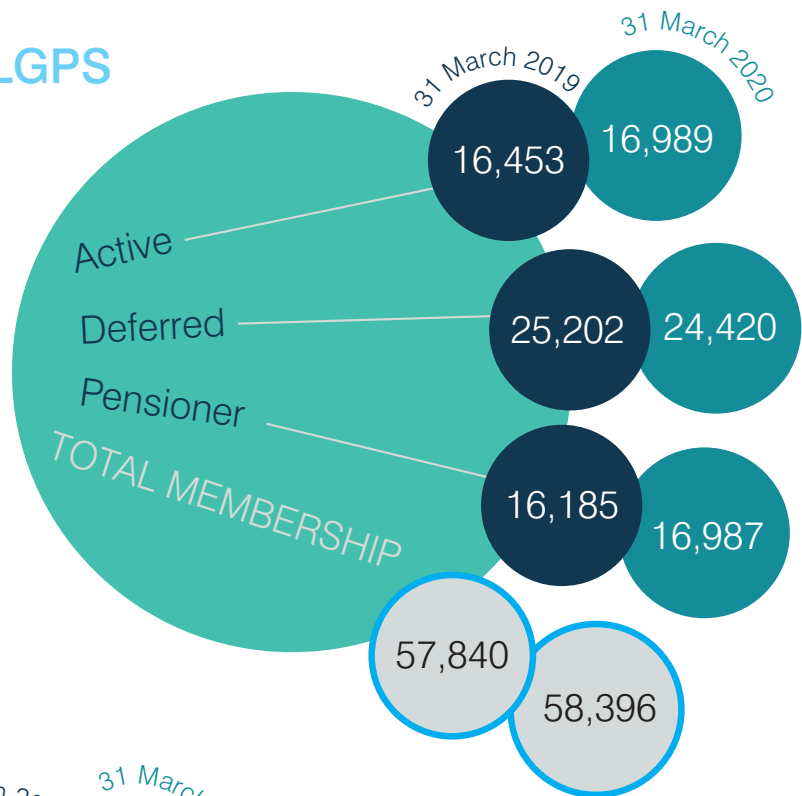
LGPS

	March 2019	% of membership	March 2020	% of membership
Active	6,818	41%	7,220	42%
Deferred	5,626	22%	6,098	25%
Pensioner	6,498	40%	7,228	43%
Total	18,942	33%	20,546	35%

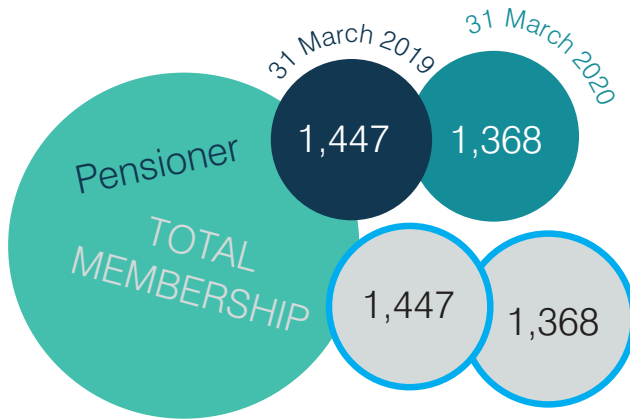
FIRE

	March 2019	% of membership	March 2020	% of membership
Active	173	34%	172	31%
Deferred	85	27%	114	30%
Pensioner	276	56%	288	56%
Total	534	40%	574	40%

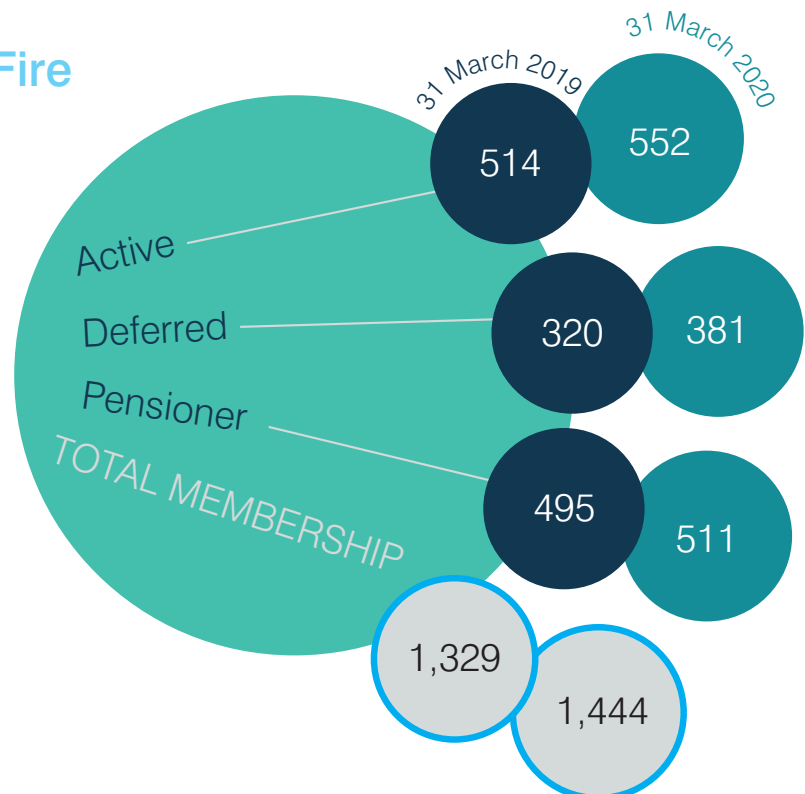
LGPS



Teachers



Fire



4. COMMUNICATIONS

Engagement

Communications are delivered by the Engagement Team, they are the link between Your Pension Service, scheme members and employers.

With effect from 16th March 2020, due to the Covid-19 situation LPP took the decision to cancel / postpone all face to face communication with employers and members.

Employers

Employer engagement activity for 1 April 2019 to 31 March 2020

Activity	Numbers Delivered
Employer Visit	5
Conference	1
Employer Training	1

Scheme member

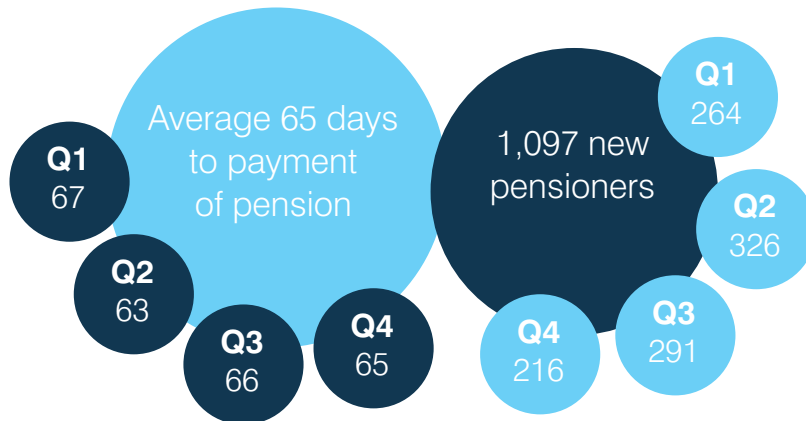
Member engagement activity for 1 April 2019 to 31 March 2020

Activity	Numbers Delivered
Pension Surgery	4
Scheme Basics	3
Stall Holder	3

5. CUSTOMER SERVICE

Retirement Experience

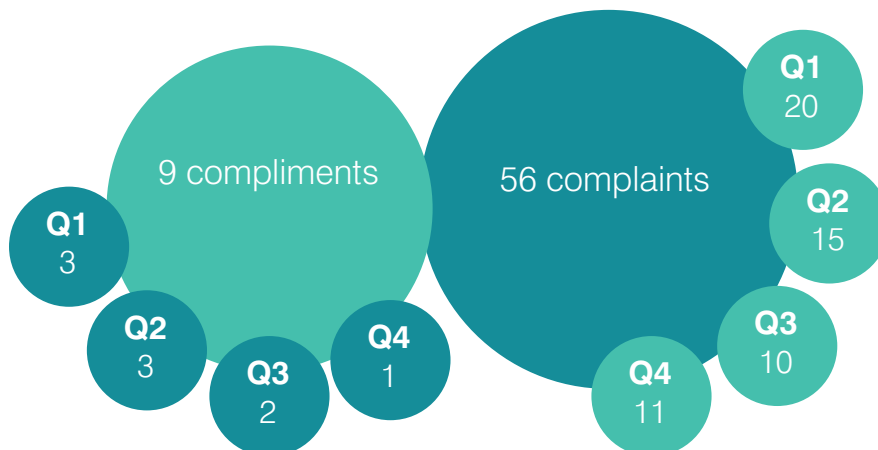
This section looks at the number of new retirees during the year and an average measure of the number of working days between the retirement date and first payment date to member.



Compliments/Complaints

The compliments received related to the helpful, prompt and professional service provided by the staff within Your Pension Service.





A high proportion of the complaints related to delays in the payment of benefits and not meeting member expectation.









Customer Satisfaction Surveys

LPP have introduced feedback mechanisms to measure customer satisfaction following interaction with the service. Results for the period 1 April 2019 to 31 March 2020 are shown below:







Helpdesk emails (21 May 2019 – 31 March 2020)

Email				Overall Rating
Number of respondents	5,332	797	1,578	
Percentage of respondents	69%	11%	20%	Satisfied

Retirement Survey (26 May 2019 – 31 March 2020) the results below are for the LGPS Cumbria members with a response rate of 31%

Retirement Experience - LG						Overall Rating
Number of respondents	80	43	14	21	22	
Percentage of respondents	44%	24%	8%	12%	12%	Satisfied

The below results are for Cumbria Fire and Rescue members with a response rate of 11%:

Retirement Experience - Fire						Overall Rating
Number of respondents	1	1	0	0	0	
Percentage of respondents	50%	50%	0%	0%	0%	Very Satisfied

Helpdesk

The dedicated Helpdesk is the first point of contact for both scheme members and employers. Over the period 95% of LGPS and 91% of Fire calls were successfully answered against a target of 90%. Call wait time commences from when the call is connected.

Cumbria LGPS Annual	
Total Calls answered	11,762
Connect Rate	95%
Call Waiting (Max)	00:13:23
Call Waiting (Avg)	00:01:56

Cumbria Fire Annual	
Total Calls answered	430
Connect Rate	91%
Call Waiting (Max)	00:12:54
Call Waiting (Avg)	00:02:36

Call Category

Cumbria LGPS Annual	
General Enquiries	9,890
Pensions Online and P60	1,872

Cumbria Fire Annual	
General Enquiries	377
Pensions Online and P60	53