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## **LPPA Engagement, Marketing & Communications Team Report** 7 March 24

### **Section 1**

Engagement and Communication Activities 2023/24 Q4 (Jan to Feb)

### **Section 2**

Planned Activity Q1 24/25 (plus March 24)

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period Q4 2023/24 (January and February), and activities the team will be undertaking in the next 3 months.

### **Executive Summary**

In Q4, in addition to ongoing employer training, there has been a focus on several key activities including:

- Employer updates on submitting monthly returns, including mandatory Reasons for Leaving, LPPA bulk processing of leavers from submitted monthly files, and reduced numbers of individual leaver forms that employers need to submit from March.
- Life certificate emails have been issued to LCPF retired members who live outside of the UK.
- Launch of a new Retirement section on the LPPA website (to help members understand and navigate the retirement process)

In March and Q1 24/25, the focus is to ensure that all LCPF employer monthly return files are up to date, ready for the end of year processing of annual benefit statements.

Planning for P60 and ABS communications to members is also a priority.

All engagement and communication objectives were successfully delivered during the period, and plans are on track for Q1 (further detail is provided in the report).

# 1 Engagement and Communication Activities 2023/24 Q4 (Jan to Feb)

## 1.1 Engagement Activity – Employer and Member Training

Date	Activity	Employer Name	Attendee Number
08/01/2024	Pre-Retirement – True Bearing	Lancashire County Council	20
09/01/2024	New Recruits (PCSOs LG)	Lancashire Police	60
09/01/2024	Absence and Ill Health	United Learning Trust	2
15/01/2024	Making sense of your pension	Lancashire Pension Fund Members	5
16/01/2024	Pre-Retirement – True Bearing	Blackpool Council	14
16/01/2024	Making sese of retirement	Lancashire Pension Fund Members	4
23/01/2024	Pre-Retirement – True Bearing	West Lancashire Council	12
23/01/2024	LGPS Scheme Essentials	Preston College	1
23/01/2024	LGPS Scheme Essentials	Lancaster University	1
30/01/2024	UPM Employer Portal	Learning Together Trust (St Pauls)	1
05/02/2024	Pre-Retirement – True Bearing	Lancashire County Council	22
05/02/2024	Submitting Monthly Returns	Lancaster University	1
13/02/2024	Making sense of your pension	Lancashire Pension Fund Members	3
20/02/2024	Pre-Retirement – True Bearing	Edgehill University	17
22/02/2024	Employer Responsibilities	LPPA	1

### Summary of data table above:

Pre - Retirement LG (True Bearing): LPPA deliver pre-retirement sessions (same content as the Retirement Essentials workshops) and True Bearing are the organisers.

## 1.2 Engagement Activity – Employer visits and support

In addition to the employer and member training sessions delivered, there have been virtual employer visits and support sessions held.

Date	Session	Employer Name
12/01/2024	Virtual Employer Visit	Blackpool Council
17/01/2024	Virtual Employer Visit	The Chief Constable

01/02/2024	Virtual Employer Visit	Runshaw College
26/02/2024	Virtual Employer Visit	Lancaster University
29/02/2024	Virtual Employer Visit	Blackburn with Darwen Council

### 1.3 Engagement Team Update

The focus for the Engagement Team for Q4 is to ensure monthly return files are up to date ready for the end of year processing of annual benefit statements. This has involved calling and emailing any employers with any outstanding returns for the year and to get those up to date.

All member and employer training sessions continue to be bookable via the LPPA website on designated training pages.

### 1.4 PensionPoint update (5 March)

- Active members 14,012
  - Deferred members 14,156
  - Retired members and beneficiaries – 21,341
  - **Total – 59,509**
- This represents around 30% of the total LCPF membership base, which is ahead of the 20% 12-month target (set at UPM launch).
  - The [PensionPoint resource page](#) has been updated to promote the benefits of PensionPoint and recent changes (re. service history etc).
  - A new page has been added to PensionPoint encouraging members to join the member panel – where they can provide feedback on ongoing LPPA communications.
  - A follow up email campaign is planned later this month to encourage more members to register (targeting those who have not registered following previous communications).

### 1.5 Communications Update (Employer and Member)

- Monthly returns email [reminders](#) have continued to be issued to LCPF employers with links to the monthly returns page of the LPPA website.
- An [email](#) has also been sent to LCPF employers explaining that Reasons for Leaving must be added in the right format when completing their monthly return – this will help to reduce the number of individual leaver forms they need to complete from March onwards.
- [Follow up emails](#) have also been sent highlighting the benefits of the monthly file validation process, and the bulk processing of leaver records.
- 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](#).
- A series of [life certificate emails](#) have been sent to retirees who live outside of the UK.

## 1.6 LPPA website development

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 LCPF members include (click links to view):

- [New retirement landing page](#)
- [LGPS planning for retirement page](#)
- [Early retirement](#)
- [Late retirement](#)
- [Flexible retirement](#)
- [Ill health landing page](#)
- [Ill health LGPS page](#)
- [Looking for a lost pension?](#)

The new pages guide members through the retirement process, using jargon free language and visual tools and videos to help engage and improve member experience.

- The [50/50 page](#) has also been updated to promote the benefits of staying in the LGPS even when budgets are tight.

## 1.7 Member Sessions

All member sessions are bookable via the LPPA Member Training page.

### **Making Sense of your Pension (online sessions)**

These two-hour online sessions are aimed at members to help improve their knowledge of their LGPS pension, whether they have recently joined the scheme, or have been in the scheme a while.

### **Making Sense of Retirement (online sessions)**

These two-hour online sessions are aimed at Members who are reaching retirement age (age 55 and over) to help improve their knowledge of the retirement.

## 2 Planned Activity Q1 2024/2025 plus March 24

- Communications activity will continue to encourage LCPF members to register for **PensionPoint** (promoting the benefits of online access to their pension). This will include
  1. Emails to non-registered members
  2. More signposting to PensionPoint on the LPPA website, with clear communication of the benefits of registering.
- **Employer training sessions** will continue throughout Q4 with sessions on:
  1. UPM employer portal

2. Monthly Returns
3. Employer responsibilities
4. Scheme essentials
5. Absence and ill health

- **Planning for retirement newsletter emails** – to be sent in March (see above).
- **Our digital newsletter for retirees** is also planned to be sent in Q1, with emails targeting all retired LCPF members.
- **LPPA website developments** – as well as making ongoing improvements to the functionality, user experience and search functions of the website, we are continuing to make improvements to the new retirement section of the website. Improvements will also be made to the P60 and ABS pages, ahead of member communications planned for Q1 and Q2 respectively.
- **P60s** will be added to PensionPoint by 31 May 2024 and emails will be sent in Q1 to any LCPF members for whom we hold an email address. Paper P60s will also be mailed to those who have opted out of digital communications or contact LPPA to request paper copies.
- Updates will be communicated to any LCPF members affected by the age discrimination remedy (McCloud) on the LPPA website.
- **A review of LPPA member letters** has now started. 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, and initially we will be looking specifically at member retirement letters.