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## **LPPA Engagement, Marketing & Communications Team Report June 22**

### **Section 1**

*Engagement Activities Q1 2022/23 (Apr 22 - June 22)*

### **Section 2**

*Planned Activity Q2 2022/23 (July 22 - Sept 22)*

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period April to June March 2022 (to date), and activities the team will undertaking in the next 3 months.

### **Executive Summary**

This report outlines the ongoing support that has been maintained with LCPF employers and members in the last 3 months, whilst in addition supporting the successful rollout of project PACE and the implementation of LPPA's new UPM administration system. Highlights of the last three months include:

- Undertaking all statutory P60 communications to retired LCPF fund members by deadline (end May 22)
- Spring newsletter (online) distributed to members
- Year end data submission process undertaken, prior to fund valuation deadlines and member ABS production (statutory deadline end August 22)

In summary, Q1 has seen the focus switch to planning for Phase 2 of PACE roll out, including all engagement and communication activities. All objectives were successfully delivered during the period, and plans are all on track for Q2

Chris Dawson  
Head of Engagement, Marketing & Communications (LPPA)  
16 June 22

## LPPA Engagement, Marketing & Communications Team Report

### 1 Engagement Activities Q1 2022/23 (April 22 to June 22)

*\*Activities up to 09 June 2022*

#### 1.1 Engagement Activity – Member and Employer Training

Date	Activity	Employer Name	Number Attended
05/04/2022	Pre - Retirement LG (LCC/True Bearing)	Blackpool Council Members	20
25/04/2022	Pre - Retirement LG (LCC/True Bearing)	Lancashire County Council Members	14
03/05/2022	Making sense of your pension - Members	LCPF Members	10
12/05/2022	Making sense of your retirement - Members	LCPF Members	9
16/05/2022	Pre - Retirement LG (LCC/True Bearing)	Lancashire County Council Members	12
18/05/2022	LCC Pre-Retirement (Schools)	Lancashire County Council Members	14
24/05/2022	Pre - Retirement LG (LCC/True Bearing)	University of Central Lancashire Members	1
24/05/2022	LGPS Scheme Essentials - Employer Training	Cardinal Newman College	1
24/05/2022	LGPS Scheme Essentials - Employer Training	University of Central Lancashire	1
24/05/2022	LGPS Scheme Essentials - Employer Training	Ribble Valley Council	1
31/05/2022	LGPS Scheme Essentials - Employer Training	Lancaster Girls Grammar School	1
07/06/2022	Making sense of your retirement - Members	LCPF Members	6
09/06/2022	Making sense of your pension - Members	LCPF Members	11
09/06/2022	LCC Pre-Retirement (Schools)	Lancashire County Council Members	9

#### **Summary of data table above:**

There have been a high number of pre-retirement sessions with employers including UCLAN and Lancashire County Council.

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

#### 1.2 Engagement Team Update


All member and employer training sessions are bookable via the LPPA website on designated training pages, with Q2 dates currently available to book. The Engagement Team are focusing on preparing LCPF employers for UPM implementation and delivering training sessions in Q2. Training will be split into two sessions, one to cover navigation of the portal and key processes, including leavers and joiners, and the other will focus on the monthly returns process and the specific requirements.

Home > Employers > Training

## Employer training

To help you understand your pension scheme and how the processes work, we deliver a number of employer training sessions throughout the year. Take a look and see which ones are right for you

Scroll down ↓

A graphic with a teal background. At the top, a white box contains the text 'Employer Training'. Below this, three stylized human figures are shown: a light blue one on the left, an orange one in the center, and a dark blue one on the right. A red vertical bar with a red circle at the top is positioned to the right of the figures, with a thin red line pointing from the circle to the text 'Employer Training' in the white box above.

Use the links below to find out what's covered in our upcoming sessions. Or view our full 2022-2023 [activity calendar](#).

Home > Members > Training

## Making sense of your pension

To help you get a better understanding of your pension, we deliver a number of online training sessions throughout the year.

Click on the links below to find out more about our upcoming training sessions (April-June).

Scroll Down ↓

A graphic with a light blue background. At the top, a white box contains the text 'FREE online training'. Below this, three stylized human figures are shown: a light blue one on the left, an orange one in the center, and a dark blue one on the right. A red vertical bar with a red circle at the top is positioned to the right of the figures, with a thin red line pointing from the circle to the text 'FREE online training' in the white box above.

Use the links below to find out more about our upcoming training sessions (April-June).

### 1.3 Member Communications

There have been various communications sent in Q1, which have included topics as detailed below:

- Getting ready for retirement - an email is sent once we have received a member's intention to retire form. It advises them of the process and gives them the option to download a retirement checklist and to watch LPPA's retirement video.
- Member surveys - emails are sent after retirement, helpdesk interactions, bereavements, and joining the scheme, to allow LPPA to gather feedback and continue to improve the experience across the processing teams
- [P60 emails for retired members](#) – explaining that their P60s are available to view on MPO.
- [ABS emails](#) for deferred members (May) and active members (June) – explaining that their Annual Benefit Statements are available to view on MPO

- Retirement newsletter – available in a new online format for retired members. [View spring newsletter \(retirees\)](#)

#### 1.4 Member Sessions

All member sessions are bookable via 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 process and claiming their LGPS pension.

Date	Subject	Numbers of LCPF members attending
03/05/2022	Making sense of your pension	10
12/05/2022	Making sense of your retirement	9
07/06/2022	Making sense of your retirement	6
09/06/2022	Making sense of your pension	11

#### 1.5 Employer Communications

Various email communications have been sent to employers in Q1 including:

- Welcome to the Engagement Team email – introducing some new LPPA faces and how they can offer employer support. [View Engagement Team email](#)
- Pension Pulse employer newsletters sent out in April and May (June to be sent later this month)

[April Pension Pulse](#)

[May Pension Pulse](#)

#### 1.6 Ongoing Website Development

- **A new training page has been created** – making it easier for employers to book ongoing training sessions. [View new training page](#)
- **Regular updates to the news page** – there are weekly articles added to the website which are on a variety of topics as detailed below. This page is used to keep both members and employers informed with current events in the pensions industry.

[News • Local Pensions Partnership Administration \(lppapensions.co.uk\)](#)

- Several new FAQs have been added to the website to help members understand their pension and the processes involved. [View FAQ pages](#)

## **2 Planned Activity Q2 2022/2023**

### *2.1 LCPF Employer Activities (July to September)*

- As mentioned previously, the Engagement Team have now finalised their training schedule for 2022/2023. This includes the regular scheme essentials and retirement essentials for members which will continue to be delivered each month, and further sessions for employers:
  - Scheme Essentials Employers- A session which covers pension basics for new or existing scheme employers, including topics such as how to calculate final pay, APP, and scheme specific support (North employer services portal).
  - Scheme Leavers Training- this session will cover what an employer needs to do when an employee is leaving the scheme, which will aim to increase awareness of the importance of early retirement notifications.
- Employer visits will be conducted with employers that have a high number of outstanding leaver forms to ensure any training needs are being met. The aim of these sessions is to ensure that the data is correct for the transition to UPM. This will continue to be prioritised over the next quarter
- From Q1 and for 2022/23, the LPPA employer engagement team will be arranging visits with employers with more than 100 members, including targeted visits with those who have been identified as requiring additional support. Focus groups meetings will also take place across the year, with the 20 largest employers across all LPPA (LG) fund clients (7 LCPF employers will be included and invited to these groups)
- All employer visits (training sessions, support meetings) will continue to be delivered remotely in 22/23. The Engagement team have continued to build on the successful delivery of these sessions during the last two years – the team has adapted the delivery of these sessions to increase the reach across large numbers of employers, and consistently receive positive feedback and satisfaction scores (online training sessions are surveyed with participants)
- With the launch of UPM (Project PACE) confirmed for LCPF on 28 October, the Q2 period will be focused on training employers on how to use the new employer portal, and specifically on submitting monthly returns

### *2.2 LCPF planned employer communications (July-September)*

Employer communications for Q2 will have a strong focus on the move to UPM, with training invites, videos and online resources being communicated.

### *2.3 LCPF Member Activities (July-September)*

- Active member newsletter (in online format) – due to be created in July
- Several web updates will be added in Q2 – including news stories, FAQs and member videos.
- Information on the new member portal (PensionPoint) will be emailed to members in September ahead of the move in October