



LPPA Engagement, Marketing & Communications Team Report September 22

Section 1

Engagement Activities Q2 2022/23 (July 22 – Sept 22)

Section 2

Planned Activity Q3 2022/23 (Oct 22 – Dec 22)

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period July to September 2022, and activities the team will be 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 quarter, whilst supporting the successful rollout of project PACE and the implementation of LPPA's new UPM administration system. Highlights of the last three months:

- Undertaking all statutory ABS communications to active and deferred LCPF fund members by deadline (end August 22)
- Summer newsletter (online) distributed to members – more details on content and member engagement, including positive feedback received from members, is included later in this report
- Supporting the Fund in its valuation activities including employer engagement and communications
- Delivering training to LCPF employer in readiness for the launch of UPM and the new employer portal in October

In summary, Q2 has seen a focus on ensuring that LCPF employers are prepared for UPM go live in October (not only employers – LCPF members will have received their first [PensionPoint communication](#) by the end of September). All objectives were successfully delivered during the period, and communication and engagement plans are on track for Q3.



1 Engagement Activities Q2 2022/23 (July 22 to Sep 22)

*Activities up to 23 September 2022

1.1 Engagement Activity – Employer and Member Training

Date	Activity	Employer Name	Number Attended
05/07/2022	Making sense of your pension - Members	LCPF Members	3
11/07/2022	Pre - Retirement LG (True Bearing)	LCC Members	16
12/07/2022	Making sense of your retirement - Members	LCPF Members	12
19/07/2022	PensionPoint Awareness Training	Lancashire Police	3
19/07/2022	PensionPoint Awareness Training	Lancashire Fire and Rescue	2
19/07/2022	PensionPoint Awareness Training	Lancaster City Council	1
19/07/2022	PensionPoint Awareness Training	Endeavour Learning	2
03/08/2022	Making sense of your pension - Members	LCPF Members	17
11/08/2022	Making sense of your retirement - Members	LCPF Members	8
06/09/2022	Making sense of your pension - Members	LCPF Members	18
14/09/2022	LGPS Scheme Essentials	Preston City Council	3
14/09/2022	LGPS Scheme Essentials	UCLAN	2
14/09/2022	LGPS Scheme Essentials	Lancaster City Council	2
14/09/2022	LGPS Scheme Essentials	Lancashire Police	2
14/09/2022	LGPS Scheme Essentials	Lancashire Fire and Rescue	2
15/09/2022	Making sense of your retirement - Members	LCPF Members	4
20/09/2022	Scheme Leavers Training	Lancaster University	1
20/09/2022	Employer Panel	Edge Hill University	1
20/09/2022	Employer Panel	Hyndburn Borough Council	1
21/09/2022	Pre - Retirement LG (True Bearing)	Blackpool Borough Council Members	15

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.

- **PACE UPM Training**

Date	Session	Employer	Number attended	Employers represented
09/08/2022	System Navigation Training	LCPF Employers and Payroll Providers	11	71
16/08/2022	System Navigation Training	LCPF Employers and Payroll Providers	26	48
18/08/2022	Monthly Returns Training	LCPF Employers and Payroll Providers	6	44
01/09/2022	Monthly Returns Training	LCPF Employers and Payroll Providers	14	57
06/09/2022	Monthly Return Training	LCPF Employers and Payroll Providers	9	5
08/09/2022	Monthly Return Training	LCPF Employers and Payroll Providers	15	31
13/09/2022	System Navigation Training	LCPF Employers and Payroll Providers	6	26
15/09/2022	Monthly Return Training	LCPF Employers and Payroll Providers	9	33
20/09/2022	Monthly Return Training	LCPF Employers and Payroll Providers	13	11
22/09/2022	System Navigation Training	LCPF Employers and Payroll Providers	17	48

1.2 Engagement Activity – UPM Employer Portal Training

In addition to the employer and member sessions delivered during Q2, there have been specific training sessions delivered to prepare employers for the launch of UPM in October 2022. The sessions covered System Navigation and Submitting Monthly Returns. The data in the table above represents the number of attendees per session and how many employers have been represented, based on who submits data on their behalf. For example, a third-party payroll provider may provide information via the portal for 20 LCPF employers.

There have also been specific sessions for Lancashire County Council and LCPF to prepare for the launch of UPM.

Date	Session	Employer	Number attended
14/07/2022	Client meeting – portal demo	LCPF	7
06/09/2022	System Navigation Training	Lancashire County Council	4
21/09/2022	Data Collection File	Lancashire County Council	4
22/09/2022	Leaver Process	Lancashire County Council	4

1.3 Engagement Team Update

In September, the Employer Engagement Team launched the Employer Panel, with twelve employers registering to be part of the panel, of which three are Lancashire County Pension Fund Employers. Two of the three employers attended the first panel meeting with discussions around the support employers require and how the LPPA website can be used to support their activities.

All member and employer training sessions continue to be bookable via the LPPA website on designated training pages, with Q3 dates currently available to book. A specific UPM employer portal training page hosts all training dates for pre-go live training.

1.4 Member Communications

There have been various communications sent in Q2, which have included topics as detailed below:

- **Getting ready for retirement email** – 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.
- **LCPF board vacancies email** sent in July and August
- **Member survey emails** – 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
- **ABS activity (active and deferred members)** - ABS communications activity with active and deferred LCPF members receiving email notification that their ABS was available via My Pension Online (member portal). Those who chose to receive their ABS in the post, received them by the end of August 22 (statutory deadline).
- **Active/deferred member newsletter** – in a new online format, which allows members to view and share articles in an easy-to-read, mobile-friendly format. This was based on feedback from the Retirees newsletter, sent to LCPF pensioners earlier in 2022 and shared with the local pension board. The new format was well received by other LPPA clients and had a positive response from members (75% opened the Retirees newsletter, half then went on to the website to read the newsletter). Over half of LCPF members viewed the newsletter on a mobile phone.



Method

- Newsletter hosted on LPPA website
- Emails sent to all contactable LCPF active and deferred members
- Reminder LinkedIn post also sent following initial emails
- Included a 'News from your Pension scheme' section, as requested by the LCPF communications team

Content

- PensionPoint resources (how to get online access to your pension)
- Understanding your ABS
- Moving abroad
- Pension health check
- Nominating a beneficiary

- Plus other articles – [see link](#)

Member Feedback

- Mobile phone views = 59%; iPad / Tablet = 5%; Desktop PC = 36%
- Majority of member panel (over 90%) enjoyed newsletter and liked the new format
- 100% found it easy to navigate
- A number of new web pages have created in Q1 including new [member case study page](#), [pension health check page](#) and a dedicated [IFA page](#).

1.5 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	Number of LCPF members attending
05/07/2022	Making sense of your pension	3
12/07/2022	Making sense of retirement	12
03/08/2022	Making sense of your pension	17
11/08/2022	Making sense of retirement	8
06/09/2022	Making sense of your pension	18
15/09/2022	Making sense of retirement	4

1.6 Employer Communications

Various email communications have been sent to LCPF employers in Q2 including:

- [Teams training dates email](#)
- [Address reminder email](#)
- [LCPF valuation forum](#)
- Various **PACE planning emails**, including [Road map](#) and [training dates](#)
- **Pension Pulse** employer bulletin sent out in [July](#) and [September](#)



1.7 *Ongoing Website Development*

- [New PACE page created \(with timeline included\)](#)
- [New submitting employer information page](#)

2 *Planned Activity Q3 2022/2023*

2.1 *LCPF Employer Activities (October to December)*

- Monthly scheme essentials and retirement essentials are available for members and booking is available via LPPA website and shared with employers to circulate to employees. Employer training sessions will continue with a focus on monthly returns and navigating the UPM employer portal, sessions include:
 - UPM employer portal Training – sessions will be available for employers once the portal has been launched, to support with general navigation and submitting monthly return data file
 - Scheme Leavers Training- this session will cover what an employer needs to do when an employee is leaving the scheme, and how to provide the details to LPPA via the UPM employer portal
- Employer visits will be conducted with employers to support with the transition to UPM employer portal and the new monthly return specification, focusing on the larger employers and payroll providers.
- All employer visits (training sessions, support meetings) will continue to be delivered remotely in 22/23.

2.2 *LCPF planned employer communications (October - December)*

- Employer communications for Q3 will have a strong focus on the move to UPM. They will include regular update emails on the changes ahead with launch communications, videos and online resources.

2.3 *LCPF Member Activities (October - December)*

- Member communications for Q3 will focus on the launch of PensionPoint, with emails, videos and resources communicated on an ongoing basis.
- We will also be launching a dedicated Help Hub section on the website with easy-to-find FAQs and other collateral.