



LPPA Engagement, Marketing & Communications Team Report December 22

Section 1

Engagement Activities Q3 2022/23 (Oct 22 – Dec 22)

Section 2

Planned Activity Q4 2022/23 (Jan 23 – March 23)

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period October to December 2022, and activities the team will be undertaking in the next 3 months.

Executive Summary

In Q3, there have been various communications and engagement activities which have supported LCPF members (focused on PensionPoint registrations, the new member portal) and employers (training to support their transition to the new UPM employer portal, and the submission of their monthly data file returns).

Client support has also been provided in communicating valuation support sessions and fund strategy consultations to LCPF employers

All engagement and communication objectives were successfully delivered during the period, and plans are on track for Q4 (further detail is provided in the report).

1 Engagement Activities Q3 2022/23 (Oct 22 to Dec 22)

**Activities up to 22 December 2022*

1.1 Engagement Activity – Employer and Member Training

Date	Activity	Employer Name	Number Attended
04/10/2022	Pre - Retirement LG (True Bearing)	Blackburn with Darwen BC Members	26
04/10/2022	UPM Employer Portal Training	Lancashire Police (LG)	5
04/10/2022	UPM Employer Portal Training	LCC	5
05/10/2022	UPM Employer Portal Training	LCPF Employers	39
06/10/2022	Making sense of your pension	LCPF Members	11
06/10/2022	Monthly Returns Training	LCPF Employers	50
10/10/2022	Pre - Retirement LG (True Bearing)	LCC Members	15
12/10/2022	UPM Employer Portal Training	LCPF Employers	7
13/10/2022	Pre-Retirement (LCC)	LCC Members	9
13/10/2022	LGPS Scheme Essentials Training	LCPF Employers	4
01/11/2022	Monthly Returns Training	LCPF Employers	12
03/11/2022	UPM Employer Portal Training	LCPF Employers	10
08/11/2022	Making sense of your pension	LCC Members	10
10/11/2022	Making sense of Retirement	LCPF Members	7
15/11/2022	Monthly Returns Training	LCPF Employers	7
17/11/2022	Scheme Leavers Training	LCPF Employers	8
21/11/2022	Pre - Retirement LG (True Bearing)	Lancashire Police (LG members)	14
21/11/2022	PensionPoint Awareness Training	LCPF Employers	6
22/11/2022	UPM Employer Portal Training	LCPF Employers	6
24/11/2022	Pre - Retirement LG (True Bearing)	UCLan members	31
05/12/2022	Pre - Retirement LG (True Bearing)	LCC Members	17
06/12/2022	UPM Employer Portal Training	LCPF Employers	2
08/12/2022	Monthly Returns Training	LCPF Employers	15
13/12/2022	Scheme Leavers Training	LCPF Employers	8
14/12/2022	PensionPoint Awareness Training	LCPF Employers	3
15/12/2022	UPM Employer Portal Training	LCPF Employers	4

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 during Q3, there have been virtual employer visits and support sessions held. These have had a focus on navigating the UPM employer portal and uploading the Monthly Return via the portal.

Date	Session	Employer	Number attended
06/10/2022	Employer Visit (support)	Edge Hill University	3
06/10/2022	Client Meeting	LCPF	3
04/11/2022	Employer Visit (support)	Penwortham Town Council	1
04/11/2022	Employer Visit (support)	The Floorbrite Group	1
15/11/2022	Employer Visit (support)	MHR Global	2
16/11/2022	Employer Visit (support)	UCLan	1
18/11/2022	Employer Visit (support)	Runshaw College	2
21/11/2022	Employer Visit (support)	Runshaw College	2
22/11/2022	Employer Visit (support)	UCLan	3
22/11/2022	Employer Visit (support)	Haslingden High School	1
23/11/2022	Employer Visit (support)	Service Alliance	1
23/11/2022	Employer Visit (support)	Blackburn with Darwen B.C	9
23/11/2022	Employer Visit (support)	Lancashire C.C	1
24/11/2022	Employer Visit (support)	Nelson & Colne college	1
25/11/2022	Employer Visit (support)	Freckleton Parish Council	1
02/12/2022	Employer Visit (support)	Cardinal Newman	2
02/12/2022	Employer Visit (support)	Together Housing	1
06/12/2022	Employer Visit (support)	Together Housing Association Ltd	1
08/12/2022	Employer Visit (support)	Blackburn with Darwen B.C	2
08/12/2022	Employer Visit (support)	Myerscough College	1
09/12/2022	Employer Visit (support)	Penwortham Town Council	1
12/12/2022	Employer Visit (support)	Aspens Services Ltd	1
12/12/2022	Employer Visit (support)	Runshaw College	1
12/12/2022	Employer Visit (support)	Penwortham Town Council	1
12/12/2022	Employer Visit (support)	Cliviger Parish Council, Darwen Town Council, Habergham Eaves Parish Council, Old Laund Booth Parish Council	1
13/12/2022	Employer Visit (support)	Haslingden	1
15/12/2022	Employer Visit (support)	UCLan	1
15/12/2022	Employer Visit (support)	Lancashire C.C	2
19/12/2022	Employer Visit (support)	Lancashire C.C	1
22/12/2022	Employer Visit (support)	Blackpool Transport	1

1.3 Engagement Team Update

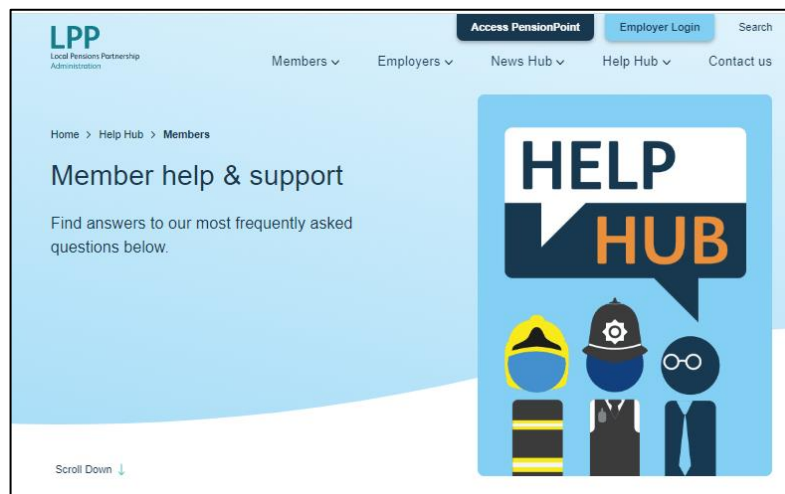
The focus for the Engagement Team in Q3 has been the transition to UPM Employer Portal for employers and PensionPoint for members, through the delivery of group training sessions and support visits.

All member and employer training sessions continue to be bookable via the LPPA website on designated training pages, with Q4 dates currently available to book.

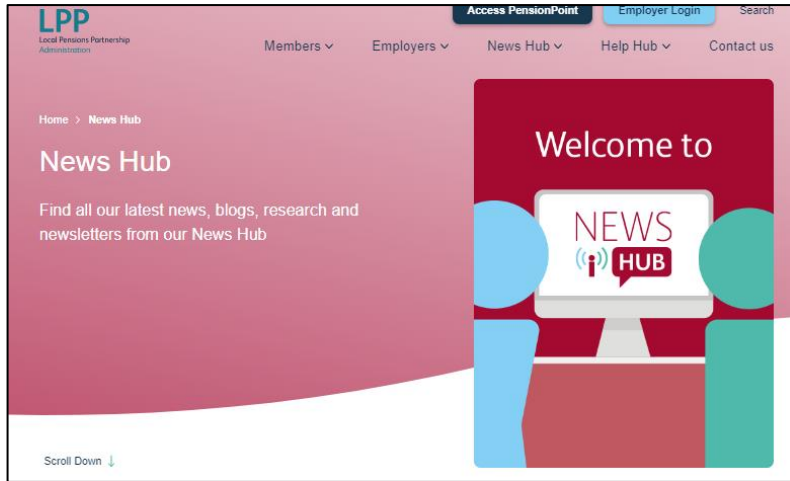
1.4 Member Communications

There have been various communications issued in Q3, most of which focused on the launch of UPM and PensionPoint, the new member portal, on the 28 October

- A [pre-launch PensionPoint email](#) was issued to LCPF members
- A [post-launch PensionPoint email](#) was sent, encouraging members to register for the new portal – the email also directed members to user videos and FAQ's to assist in the process
- A **blackout period** (14 to 28 October) in the period prior to go-live – during this time, no new casework / processing of member data could be undertaken by LPPA – resulted in member communications being added to the LPPA website, and IVR messages in the Helpdesk
- In addition to the blackout period, several **UPM maintenance days** in Q3 (9 Nov, 29 Nov to 1 Dec) also resulted in no new casework processing (again, these dates were communicated to members on the website)
- A member panel (which includes LCPF members) email was issued to share results of a survey undertaken on [the new online newsletter](#), and asking for feedback on the FAQ (Frequently Asked Questions) section of the LPPA website
- [Help Hub](#) was launched in December on the LPPA website, a new member help and support section that consolidates all resources (FAQ's, videos, forms and documents, training) into one area. The 'search' function has also been improved so that members can access the information they need easily and quicker



- [News Hub](#) was launched at the same time, a website page that enables quick and simple access to all LPPA new articles, blogs and research stories. It also includes links all the latest LPPA newsletters



- PensionPoint update** (16 Dec) – after go-live on the 28 October, the LPPA communications team have been contacting members to encourage them to register for PensionPoint. The following figures represent the number who have registered to date:

Active members - 8,956

Deferred members – 5,429

Retired members and beneficiaries – 7,996

Total 22,834

This represents 12.1% of the total LCPF membership base, and is ahead of target (10% of all members 6 months following launch, 20% at 12 months)

- [Employer toolkit page](#) created to help LCPF employers communicate the benefits of PensionPoint to their members.

11.5 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
06/10/2022	Making sense of your pension	11
08/11/2022	Making sense of your pension	10
10/11/2022	Making sense of Retirement	7

1.6 *Employer Communications*

There have been various LCPF employer communications sent in Q3, supporting the launch of UPM and the new employer portal on the 28 October, and training and reminders to support the move of monthly data file returns from EPIC to the new portal.

- w/c 10 Oct, **Blackout** [period email](#)
- w/c 10 Oct, Monthly Returns [reminder email](#)
- w/c 17 Oct, Monthly Returns final [reminder email](#)
- 28 Oct, LCPF employer [go-live email](#)
- w/c 31 Oct, LCPF employer [go-live email](#), reminder
- w/c 31 Oct, planned maintenance update [email](#) (reminders issued w/c 14 and 21 Nov)
- 4 Nov, Employer portal technical issue (monthly return deadline extended), [email](#)
- w/c 5 Dec, monthly returns submission training, [email](#)
- w/c 12 Dec, monthly returns deadline passed, [reminder email](#)

In addition to issuing LCPF employer communications for the monthly returns process, the Engagement team have also been arranging Teams training support sessions with both individual and multiple employers, as well as making post-deadline outbound calls to non-submitting employers.

1.7 *Employer newsletters and LCPF client communications*

The following emails were also issued to LCPF employers in Q3:

- November [Pension Pulse newsletter](#)
- [Valuation Engagement 1 to 1 sessions](#)
- [LCPF Funding Strategy Statement Consultation](#)

2 *Planned Activity Q4 2022/2023*

2.1 *LCPF Employer Activities (January – March)*

- 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
 - Monthly Return Training – regular training sessions available for employers to attend with a demonstration of the upload of Monthly Return file via UPM employer portal.

- Employer visits will be conducted with employers to support with the access and navigating the UPM employer portal.
- All employer visits (training sessions, support meetings) will continue to be delivered remotely in 22/23.

2.2 *LCPF planned employer communications (January – March)*

- Employer communications for Q4 will continue to focus on the transition to the UPM employer portal, and the submission of monthly data return files. Email communications will be supplemented by outbound calls in January to support LCPF employers in the submission of their monthly files

2.3 *LCPF Member Activities (January – March)*

Member communications for Q4 will focus on:

- PensionPoint registration
- PensionPoint engagement (“Keep your details up-to-date;” “Nominate your beneficiary” etc)
- Pensions Increase 2023/24 (retired members and dependents)
- New joiner engagement (dedicated resources available on LPPA website)