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LPPA Engagement, Marketing & Communications Team Report March 23

Section 1

Engagement Activities Q4 2022/23 (Jan 23 – March 23)

Section 2

Planned Activity Q1 2023/24 (April 23 – June 23)

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period January to March 2023, and activities the team will be undertaking in the next 3 months.

Executive Summary

In Q4, there have been various communications and engagement activities which have supported LCPF members and employers, including the transition to the UPM Employer Portal, monthly return upload training for employers and PensionPoint navigation for members.

For Q1, the focus will continue to be on monthly returns and navigating the UPM employer portal, and sessions on how to complete and upload the leaver form on the UPM employer portal.

For members, the focus in April and May will be on providing access to P60's documents (22/23) in PensionPoint.

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 Activities Q4 2022/23 (Jan 23 to March 23)

*Activities up to 3 March 2023

1.1 Engagement Activity – Employer and Member Training

Date	Activity	Employer Name	Number Attended
05/01/2023	Submitting Monthly Returns	LCPF Employers	8
09/01/2023	Pre-retirement (True Bearing)	Lancashire County Council	22
10/01/2023	UPM Employer Portal	LCPF Employers	4
10/01/2023	Making Sense of Your Pension	LCPF Members	12
12/01/2023	Making Sense of Retirement	LCPF Members	11
17/01/2023	Submitting Monthly Returns	LCPF Employers	5
19/01/2023	LGPS Scheme Essentials	LCPF Employers	9
02/02/2023	Submitting Monthly Returns	LCPF Employers	6
06/02/2023	Pre-retirement (True Bearing)	Lancashire County Council	19
07/02/2023	Pre-retirement (True Bearing)	West Lancashire Council	27
07/02/2023	Making Sense of Retirement	LCPF Members	9
09/02/2023	Pre-retirement (True Bearing)	Edgehill University	21
09/02/2023	Making Sense of Your Pension	LCPF Members	9
09/02/2023	UPM Employer Portal	LCPF Employers	7
21/02/2023	New Recruits (PCSOs)	Lancashire Police	30
22/02/2023	Submitting Monthly Returns	LCPF Employers	7
27/02/2023	Pre-retirement (True Bearing)	Preston Council	20

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 Q4, 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 Name	Number attended
03/01/2023	Employer Visit (support)	Safenet	1
04/01/2023	Employer Visit (support)	Lancaster City Council	1
06/01/2023	Employer Visit (support)	Liberata (Pendle)	1

16/01/2023	Employer Visit (support)	Blackburn with Darwen	6
23/01/2023	Employer Visit (support)	Burnley College	1
24/01/2023	Employer Visit (support)	Preston College	5
31/01/2023	Employer Visit (support)	Lancaster City Council	1
03/02/2023	Employer Visit (support)	Burnley College	1
03/02/2023	Employer Visit (support)	Belthorn Academy	1
06/02/2023	Employer Visit (support)	Preston College	1
07/02/2023	Employer Visit (support)	Preston College	5
10/02/2023	Employer Visit (support)	Wyre B.C	1
10/02/2023	Employer Visit (support)	YMCA Fylde Coast	1
17/02/2023	Employer Visit (support)	Nelson & Colne College	1
03/03/2023	Employer Visit (support)	Lancashire Police (LG)	3

1.3 Engagement Team Update

The focus for the Engagement Team in Q4 has been the transition to the UPM Employer Portal, monthly return uploads for employers and PensionPoint navigation for members. This has been delivered through 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 Q4:

- A [follow up PensionPoint email](#) was issued to LCPF members who hadn't already registered for the portal, which went live on 28 October 2022.
- **PensionPoint update** (7 March) –The following figures represent the number of LCPF members who have registered to date:

Active members 15,701
Deferred members – 9,802
Retired members and beneficiaries – 15,046
Total 40,549

This represents 22% of the total LCPF membership base, and is ahead of target (10% of all members 6 months following launch, 20% at 12 months)

- A [member panel email](#) (which includes LCPF members) asking for feedback on the new LPPA [Help Hub](#), which was launched in December on the LPPA website
- We've also sent out an additional email (to a cross-section of members from all clients) inviting more members to join the member panel.
- Our regular [retirement survey](#) has been sent out to LCPF (and other) members who have recently been through the retirement process

- A [pension increases](#) web page has been created to update members on the latest pension increases.
- A number of bite-sized [video FAQs](#) have been created to help answer some of the more popular member questions.
- A number of LinkedIn posts have been created covering a wide range of topics from [pension health checks](#) and [Cyber Essentials Plus certification](#) to [Pension increases](#) and [safer internet day](#)

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
10/01/2023	Making sense of your pension	12
12/01/2023	Making sense of retirement	11
07/02/2023	Making sense of retirement	9
09/02/2023	Making sense of your pension	9

1.6 **Employer Communications**

There have been various LCPF employer communications sent in Q4, supporting the ongoing transition to UPM and the move of monthly data file returns from EPIC to the new portal.

- [Pension Pulse bulletin](#) – UPM special (w/c 9 January)

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.

- [Monthly returns reminder email](#) (w/c 2 January)
- [Monthly returns deadline passed email](#) (w/c 2 January)
- [Monthly returns deadline passed email 2](#) (w/c 9 January)
- [Monthly returns training email](#) (w/c 23 January)
- [Monthly returns due email](#) (w/c 30 January)
- [Monthly returns deadline passed email](#) (w/c 6 February)

2 Planned Activity Q1 2023/2024

2.1 LCPF Employer Activities (April – June)

- 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 – 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.
 - Scheme Leavers – regular training sessions available for employers to attend to assist with completing the leaver form on the 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 23/24.

2.2 LCPF planned employer communications (April – June)

- 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 to support LCPF employers in the submission of their monthly files.
- Following communications issued to LG employers in Oct 21 and April 22 to LG employers (historical data submissions, specifically hours data and breaks in service, in readiness for the McCloud remedy), further activity is planned for LCPF employers.

2.3 LCPF Member Activities (April – June)

Member communications for Q4 will focus on:

- PensionPoint registrations
- PensionPoint engagement (“Keep your details up-to-date;” “Nominate your beneficiary” etc)
- Pensions Increase 2023/24 (retired members and dependents)
- Pensioners online newsletter
- New joiner engagement (dedicated resources available on LPPA website)
- P60 communications – email notifications to retired members to inform them they can access their document in PensionPoint (postal documents issued on request, or to members who have opted out of digital communications)