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Administration



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LPPA Engagement, Marketing & Communications Team Report 9 June 23

Section 1

Engagement and Communication Activities 2023/24 Q1

Section 2

Planned Activity Q2

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period Q1 2023/24, and activities the team will be undertaking in the next 3 months.

Executive Summary

In Q1, there have been various communications and engagement activities including portal and monthly return submission training for employers, and P60 notifications and pension increase information for members.

For Q2, the focus will be on the production of Annual Benefit Statements (ABS) and notifying deferred and active members.

All engagement and communication objectives were successfully delivered during the period, and plans are on track for Q2 (further detail is provided in the report).

1 Engagement and Communication Activities 2023/24 Q1

1.1 Engagement Activity – Employer and Member Training

Date	Activity	Employer Name
02/03/2023	Submitting Monthly Returns	LCPF Employers
06/03/2023	Making sense of your Pension	LCPF Members
07/03/2023	UPM Employer Portal	LCPF Employers
08/03/2023	Pre-retirement (True Bearing)	Lancashire Police
09/03/2023	Making sense of Retirement	LCPF Members
12/03/2023	Pre-retirement (True Bearing)	Lancashire County Council
16/03/2023	Pre-retirement (True Bearing)	UCLan
30/03/2023	Submitting Monthly Returns	LCPF Employers
03/04/2023	Pre-retirement (True Bearing)	Lancashire County Council
12/04/2023	UPM Employer Portal	LCPF Employers
18/04/2023	Making sense of your Pension	LCPF Members
20/04/2023	Making sense of Retirement	LCPF Members
27/04/2023	Submitting Monthly returns	LCPF Employers
03/05/2023	Submitting Monthly Returns	LCPF Employers
09/05/2023	Making sense of your Pension	LCPF Members
09/05/2023	Submitting Monthly Return	LCPF Employers
16/05/2023	UPM Employer Portal	LCPF Employers
16/05/2023	Making sense of Retirement	LCPF Members
18/05/2023	Pre-retirement (True Bearing)	West Lancashire Council
18/05/2023	LGPS Scheme Essentials	LCPF Employers
23/05/2023	Pre-retirement (True Bearing)	Blackpool Council
30/05/2023	Submitting Monthly Returns	LCPF Employers

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. These have had a focus on navigating the UPM employer portal and uploading the monthly return via the portal.

Date	Session	Employer Name
05/04/2023	Employer Visit (support)	Preston College
14/04/2023	Employer Visit (support)	Active Lancashire Ltd
14/04/2023	Employer Visit (support)	Preston College
24/04/2023	Employer Visit (support)	Lancaster City Council
27/04/2023	Employer Visit (support)	Parklands High School
28/04/2023	Employer Visit (support)	Progress Group
12/05/2023	Employer Visit (support)	UCLan

1.3 **Engagement Team Update**

The focus for the Engagement Team has been to support 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.

1.4 **PensionPoint update**

- **PensionPoint update** (9 June) –The following figures represent the number of LCPF members who have registered to date:

Active members 18,202 (16% increase on previous figure)

Deferred members – 11,311 (15%)

Retired members and beneficiaries – 17,550 (17%)

Total 47,063 members

This represents **25%** of the total LCPF membership base, and is ahead of target (10% of all members 6 months following UPM launch in Oct 22, 20% at 12 months)

1.5 **Communications Update (Employer and Member)**

- A Pension Pulse (employer newsletter) [‘financial year end’](#) special was issued to LCPF employers.
- **Monthly Data Returns (LCPF employer communications)**

Email communications have continued to be issued to LCPF employers to support them in the submission of their monthly data return files (reminders, pre and post deadline, have also been sent to employers). In June, these email reminders have been replaced with system generated, automated reminders which include ‘data file successfully submitted’ and ‘data file processed by LPPA (please submit your next file)’ notifications.

- **McCloud communications.**

In preparation for McCloud remedy, further [communications](#) were issued to LCPF fund employers to ensure that historic data submissions have been accurately supplied (specifically hours worked and service break data).

- **P60 communications**

P60 documents were uploaded to members online accounts (PensionPoint) by the end of May, and email notifications were issued (paper copies were also mailed to members who requested them).

- **[Spring Newsletter \(retired members\)](#)**

The online newsletter was launched on the LPPA website and communicated to retired members by email.

1.5 LPPA website development

- A [pension increases web page](#) was created to update retired LCPF members and provide information on how the increase is applied.

- Further website developments (additional pages) went live including:

1. [New Joiners](#)
2. [Member contribution rates \(23/24\)](#)
3. [Additional Pension Contributions \(APC\)](#)
4. [Pension pay dates \(23/24\)](#)
5. [Updating Your Bank Details](#)
6. [Retirement Guide for Leavers](#) (updated)
7. [Tier 3 Ill Health Retirement](#) (updated)

(The 'clickable' links in the bullet point enable you to view to the page on the LPPA website)

- A [McCloud roadmap webpage](#) was also created to update LCPF and other LPPA clients.
- Several [bite-sized video Frequently Asked Questions](#) (FAQs) were developed to help answer some of the more popular member questions, including opting out, and information on the 50:50 option. Other FAQs were added following the Spring Budget, including updates on [Lifetime Allowance \(LTA\) and annual allowance](#). A [news story](#) was also added to the LPPA website.

1.6 **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 process and claiming their LGPS pension.

Date	Subject
06/03/2023	Making Sense of Your Pension
09/03/2023	Making Sense of Retirement
18/04/2023	Making Sense of Your Pension
20/04/2023	Making Sense of Retirement
09/05/2023	Making Sense of Your Pension
16/05/2023	Making Sense of Retirement

2 *Planned Activity Q2 2023/2024*

- Communications activity will continue to encourage LCPF members to register for PensionPoint (promoting the benefits of online access to their pension).
- Employer training sessions will continue with a focus on monthly returns and navigating the UPM employer portal, and sessions will include:
 1. UPM employer portal training – sessions to support with general navigation and submitting the monthly return data file.
 2. Monthly Return Training – regular training sessions will be available for employers to attend, with a demonstration of the upload of Monthly Return file via UPM employer portal.
 3. Remote employer visits will be conducted to support with navigating the UPM employer portal.
- ABS notification activity is planned in Q2, with documents uploaded to member accounts by the statutory deadline (end August), and communications scheduled for delivery.
- The LPPA online Summer Newsletter for Active and Deferred retired members will be issued around the same time as ABS communications.