



Local Pensions Partnership
Administration



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LPPA Engagement, Marketing & Communications Team Report 15 September 23

Section 1

Engagement and Communication Activities 2023/24 Q2

Section 2

Planned 2023/24 Activity Q3

This report provides an overview of activities undertaken by the LPPA Engagement, Marketing & Communications Team in the period Q2 2023/24, and activities the team will be undertaking in the next 3 months.

Executive Summary

In Q2, in addition to fulfilling statutory obligations such as Annual Benefit Statement processing and communications, there has also been a focus on improving the level of personalised information that is available to members in their online PensionPoint account. LCPF members, as well as generating retirement estimates and accessing important pension documents, are now able to view their employment service history, previous pension transfers, and their CARE history in PensionPoint.

Similarly, there has been several enhancements made to the UPM employer portal, based on feedback and requests LPPA has received from LCPF scheme employers. These include:

- An improved, more straightforward leaver form process
- Automated portal notifications:
 1. Alerting employers when they have successfully submitted their monthly return file
 2. When the file has been processed by LPPA, and the employer can upload their next file
 3. When the employer has outstanding data queries that need to be resolved in the portal
- Crucially, LCPF employers can now run their own member retirement estimates (including redundancy quotes and tier 3 ill health estimates, including pension strain costs) in the employer portal, rather than raise requests with LPPA.

For Q3, the focus will be on the age discrimination remedy (McCloud) and notifying eligible (impacted) LCPF members with further details on what this means (information is already available on the LPPA website).

All engagement and communication objectives were successfully delivered during the period, and plans are on track for Q3 (further detail is provided in this report).

1 Engagement and Communication Activities 2023/24 Q2

1.1 Engagement Activity – Employer and Member Training

Date	Activity	Employer Name
05/07/2023	UPM Navigation Training	LCPF Employers
10/07/2023	Pre-retirement (True Bearing)	Blackburn College
10/07/2023	Pre-retirement (True Bearing)	Lancashire County Council
11/07/2023	LGPS Scheme Essentials	LCPF Employers
17/07/2023	UPM Employer Portal	LCPF Employers
18/07/2023	Making sense of your Pension	LCPF Members
20/07/2023	Making sense of Retirement	LCPF Members
27/07/2023	LGPS Employer Responsibilities	LCPF Employers
03/08/2023	LGPS Scheme Leavers	LCPF Employers
08/08/2023	Submitting Monthly Returns	LCPF Employers
15/08/2023	Making sense of Retirement	LCPF Members
17/08/2023	Making sense of your Pension	LCPF Members
22/08/2023	LGPS Scheme Essentials	LCPF Employers
05/09/2023	Absence and ill health	LCPF Employers
07/09/2023	Submitting monthly returns	LCPF Employers
12/09/2023	UPM employer portal	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
26/06/2023	Employer Visit (support)	Compass Group
27/06/2023	Employer Visit (support)	Compass Group
29/06/2023	Employer Visit (support)	Compass Group
10/07/2023	Employer Visit (support)	Blackburn College

13/07/2023	Employer Visit (support)	Blackburn with Darwen Borough Council
18/07/2023	Employer Visit (support)	Maharishi
24/07/2023	Employer Visit (support)	Burnley College
25/07/2023	Employer Visit (support)	St. Thomas the Martyr
02/08/2023	Employer Visit (support)	Greenwich Leisure Limited
03/08/2023	Employer Visit (support)	Andron
03/08/2023	Employer Visit (support)	Greenwich
10/08/2023	Employer Visit (support)	Burnley College
14/08/2023	Employer Visit (support)	Blackburn With Darwen Borough Council
15/08/2023	Employer Visit (support)	Maxim
16/08/2023	Employer Visit (support)	Burnley College
16/08/2023	Employer Visit (support)	PPA Facilities
16/08/2023	Employer Visit (support)	Blackpool Council
01/09/2023	Employer Visit (support)	Blackpool College
07/09/2023	Employer Visit (support)	Nelson and Colne College Group

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, with help in highlighting employer responsibilities in the pension administration process.

All member and employer training sessions continue to be bookable via the LPPA website on designated training pages.

1.4 PensionPoint update (6 September)

- The following figures represent the number of LCPF members who have registered on the portal:
 - Active members 20,081
 - Deferred members – 12,386
 - Retired members and beneficiaries – 18,503
 - **Total 50,970**
- This represents around 27% of the total LCPF membership base, which is ahead of the 20% 12-month target (set at UPM launch).
- New functionality has been added to the PensionPoint website, which allows members to view their **service history, transfer history and CARE history** – along with an explanatory page of how the new sections works.

1.5 Communications Update (Employer and Member)

- A [Pension Pulse](#) (employer newsletter) was issued to LCPF employers in July 2023.
- **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). Automatic email reminders have also continued for 'data file successfully submitted' and 'data file processed by LPPA (please submit your next file)' notifications.

- **Employer emails to LCPF employers in Q2**

- GAD factor update [email](#) (July)
- Changes to our postal address [email](#) (July)
- LGA resources and training [email](#) (August)

- **Active/deferred member newsletter**

The digital member newsletter was sent by [email](#) to all LCPF members in July/August (where email addresses were held). The newsletter is also held on the [News Hub page](#) of the LPPA website (along with the 2023 retired newsletter and archive newsletters).

- **McCloud (age discrimination remedy) communications**

In preparation for McCloud remedy, a [dedicated web page](#) has been created for all LG members. This is currently a holding page for all members, which will be updated with all the latest updates.

- **ABS communications**

Annual benefit statements have been added to PensionPoint for LCPF members (ahead of the 31 August statutory deadline).

This process was communicated in the active/deferred member newsletter email that went out to all members where we hold an email address. A [new ABS page](#) has also been created on the LPPA website, with signposting from the home page.

Any LCPF members who have opted out of digital communications, were sent a paper version of their ABS.

1.6 LPPA website development

Several new web pages have been developed and updated on the LPPA website to help improve the experience for LCPF members.

Key member updates include:

- New [Home page](#)
- New [member landing page](#)
- New [Pension increases page](#)
- New [Age discrimination remedy \(McCloud\) page](#)
- Lifetime allowance page [updated](#) and [FAQs](#) added
- Annual allowance page [updated](#) and [FAQs](#) added
- Retirement [checklist page updated](#)

Key employer updates include:

- Contribution rates [page updated](#)
- Retirement [page updated](#)
- Different ways of getting in touch [page](#), which includes details of the **Employer Escalation process** which has been communicated to all employers (what to do / who to contact if an urgent update is required for an outstanding request)

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

1.7 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.

Date	Subject
20/06/2023	Making Sense of Your Pension
22/06/2023	Making Sense of Retirement
18/07/2023	Making Sense of Your Pension
20/07/2023	Making Sense of Retirement
17/08/2023	Making Sense of Your Pension
15/08/2023	Making Sense of Retirement
19/09/2023	Making Sense of Retirement
17/08/2023	Making Sense of Your Retirement

2 Planned Activity Q3 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 throughout Q3 with sessions on:
 1. UPM employer portal
 2. Monthly Returns
 3. Employer responsibilities
 4. Scheme essentials
 5. Absence and ill health
- Updates will be communicated to any LCPF members affected by the age discrimination remedy (McCloud)
- **LPPA website developments** – as well as making ongoing improvements to the functionality, user experience and search functions of the website, we are reviewing several specific sections for members and employers – including the retirement and ill health sections.