

Hampshire Pension Services Employer Focus Group – 12th November 2025

Employer Attendees: Robert Atkinson (Mansel Park Primary School), Jane Barrett (University of Winchester), Olja Begg (Oak Wood School), Harpreet Bilimoria (Hedgewood School), Vicki Broomfield (New Forest District Council), Mary Cope (LHC Procurement), Doug Correa (Portsmouth City Council), Mateen Farooqy (Rosedale College), Darren Godwin (Portswood Primary Academy), Jon Gorman (Portsmouth University), Stephanie Hall (The Prospect Trust), Jo Hawker (The Academy Selsey), Janet Heath (Dolce), Brijesh Mehta (Hart District Council), Jane Milbourn (Test Valley Borough Council), Julie Routley (Yateley Town Council), Lorraine Sait (SCA Community Care Services), Carys Sturt (Hampshire County Council), Shaun Tetley (Portsmouth City Council), Heather Withers (Swakeleys Academy), Ewan Wright (Hampshire & Isle of Wight Constabulary)

Presenters / Organisers: Jonathan Brandrick, Harriet Condé, and Christopher Nobbs

Introduction

Jonathan welcomed the attendees, and advised of the purpose of the meeting – asking the employers for their thoughts and plans, and giving an opportunity for providing feedback and allowing us to improve our communication with each other. He went on to say that there would be a small amount of presenting as the purpose was for the attendees to engage us in discussion, and that we are looking forward to hearing about things we may not have thought of before. He explained that we'd be using polls and where to find those polls in the Teams browser mode, or alternatively to answer in chat function.

The feedback from today will be used to review our approach to processes and communication. We know that all of our employers have different experiences, due to size and type of organisation, and we want to learn how to better tailor our resources to employer needs.

Purpose:

- Employer feedback to help improve communications and online processes
- Review of processes
- Review of documents for members and employers
- Opportunity for Pensions Services to understand employer issues
- Help improve the customer journey for members

Agenda:

- Employer Training Review
- Employer Hub Developments
- Monthly Returns
- Upcoming Events

If the attendees have any questions, they are welcome to raise their hand or ask questions.

Employer Training Review

Chris explained the new employer workshops that we have recently implemented, to allow for more practical case studies and application of the training to improve the training. We have also produced three employer support videos as it is not always possible for employers to attend our training dates and times. We continue to offer our other training in the meantime.

Poll: Has anyone attended any of these sessions? Yes: 12% No: 88%

Chris requested any additional feedback from those who have attended these new sessions, with no response given.

Ewan Wright (HIOW Constabulary) mentioned that he was not aware of these sessions and wondered how they are communicated. Chris explained that we have a training area on the Pension Services webpage, and we also send 'Stop Press' emails out - but we would like to know what we can do to increase this awareness. Others also said they were unaware of the sessions.

Mary Cope (LHC Procurement) said that there is no such thing as too many reminders for links or opportunities to attend sessions, and would prefer to have many more reminders that they can choose to delete, than miss the opportunity.

Doug Correa (PCC) advised they were not required sessions for experienced employers, but would like to know if it is included in 'Pensions Matter's. Chris advised that we do include upcoming training sessions in this publication but notes that sending out these communications regularly is something that we are working on – to ensure the content remains relevant.

Chris went on to explain how we create our booking process – using Eventbrite to gather interest, and then creating the event invitations within Outlook / Teams. Chris has asked if anyone has any suggestions for improvement. Ewan has said Eventbrite has worked fine. Heather Withers (Swakeleys Academy) says agrees Eventbrite has been straightforward without issues. Carys Sturt (HCC) and Jon Gorman (Portsmouth University) agreed.

Chris went on to explain how we gather feedback within / after training sessions on the content of the session itself. He asks if the attendees would prefer to complete a poll / survey or have any suggestions for improvement on gathering feedback. Harpreet Bilimoria (Hedgewood School) stated that a poll at the end of the session is good – Heather agrees, as do Carys and Vicki Broomfield (NFDC) - though a point was added to not add 'Free Text' questions for the sake of efficiency. Vicki also added that an annual survey may be useful, and Ewan suggested that we could provide both to cover all bases. Chris advises we could do this, but want to make sure that what we design, and use, is productive for employers, so as not to waste our resources and their time. Heather adds an annual survey would give an opportunity to highlight any gaps in our offerings. Jane Barrett (University of Winchester) advises that they sometimes miss the slides being sent out.

Essentials of the LGPS
Leavers and Absences in the LGPS
Online Support Videos
Employer Webinars and Demos

Upcoming Training

Discretions (currently webinar) will be also implemented as an e-Learning session, and we want to improve our booking system and webinar delivery. If we use the Teams Webinar functionality, we may be able to keep the booking entirely within Teams which also sends confirmation emails, creates an event in the attendee's calendar, and sends reminders. We may then be able to dispense with Eventbrite, which can be missed or ignored compared to using our calendars. Some then miss the event as the session was not reminded or notified.

Darren Godwin (Portswood Primary Academy) says this sounds better and clearer than Eventbrite, saving additional missed emails. Carys, Heather, and Jane Milbourn (Test Valley BC), agree this sounds better. Mary wants more information / training about payroll provider responsibilities as an additional training offering – we invited Mary to email us this suggestion.

Estimate Training

Any employer contact who requests estimate access is given basic training about how to run an estimate on the Employer Hub, before being given the access. We wish to understand better what training may be useful and we would like to provide more information to employers about how estimates work, what is required from employers, and the limitations of the Hub in providing this information. This will help Employers understand better what the estimate output information is able to provide for them.

Poll: Do you run estimates on the Hub? Yes: 22% No: 78%

Chris: for those who don't, is there a particular reason why you are not using the feature if you do have access. Mary: we don't get asked to do it. Probably this is because the age profile of our membership is younger and not near retirement age. Darren, and Jane M did not know they could run estimates for

members. Janet Heath (Dolce) does not require it; Harpreet and Heather have not been asked by members, Brijesh Mehta (Hart DC) directs members to the Member Portal, Jane B advised members prefer to come straight to HCC. Jane M advised members request a form to complete. Ewan advised that he has run his own on the Member Portal out of interest, though they can't do this for Police officers, only for staff members.

Chris went on to publish a poll about the reason for requesting an estimate, with the vast majority voting on 'to understand the potential strain charge'. We currently make assumptions about why employers use it, but understanding this better would help with the training offering. Shaun Tetley (PCC) suggests we will need a facility to run bulk estimates ahead of LGR as running individual estimates will not be efficient enough for redundancy purposes. Ewan advised an IHR estimate is better produced by HCC for accuracy, but the strain charge is useful.

Darren advised that when sending a paper estimate form, the timing getting the response is not as efficient as perhaps the Employer Hub. Chris says the Hub response is instantaneous, but many don't have the confidence to do this or interpret the results. Stephanie Hall (The Prospect Trust) advises the strain charge should be at the top of the document not the bottom, as it can be missed and is the most important piece of information they need. Vicki would like further in-depth training to increase confidence. Doug advised what would be good within the fields available is that everything that is used as employer inputs for the calculation could show up on the estimate output so that it is easier to see which inputs are used, especially for the members to trust that the employer used the right figures i.e. 'best 3 in 10' figure. If employers fully understand the process and outputs, they should be able to explain it to the members.

Vicki directs members to the Portal to run their estimates, though some bring paper forms to them to submit, and as the form has been completed, they submit them to us to complete rather than using the Hub. Are we able to check how many estimates are run on the member portal per employer? Chris advised that the uptake for member portal estimates has increased. Ewan wanted to know more about what is required for an employer estimate that is needed aside from what is on the system already, and advises that going to HPF directly means more accuracy to the date requested. It also means HPF can check for other folders which may impact the quote. Doug advises there is a mixture of who uses the portal and who comes to the employer for a hub estimate. Some submit their form to them which is passed on to HPF. HPF are useful as they include AVC so better to understand tax free allowance. Shaun agrees having AVCs more embedded on the Hub may be useful; Chris explains that AVC quotes currently need to be requested directly through the provider but might improve with the Pensions Dashboard.

Development Requests:

Shaun advises we really should not take the system down during working hours as this is critical to employers and members and other suppliers do not do this. Chris advises this is being looked into.

Shaun also says, if you compare competitors to UPM, such as staff who use Heywoods, where staff run their own estimates online, they can use a slider to show how much lump sum to commute and what the outcome would then be – can this be integrated in Civica UPM so that people can better understand the lump sum functionality. In the meantime, can the estimate make much clearer that they can take something between “none” and “maximum” conversion. Chris advises this is in development - members have fed back similar, and this has been requested, but have no timeline at the moment for implementation. We are also planning to send feedback request for members on this subject.

Mary stated that they are having issues with their payroll provider (starters and leavers) – it appears there are glitches in the details coming to HPF, can we have a better reporting system where Mary can see in real time the state of starters / leavers and main section / 50:50 to check on the quality and timeliness of the submissions. Jon G requests a more detailed starter / leaver form than the Hub offers.

Poll: Preferred training format. Interactive workshop far preferred. Doug suggests including a guidance document. Mary requests recording and sharing the interactive workshops.

Member Estimate Survey – snapshot of the questions only. Feedback not requested due to time constraints.

Employer Hub Developments

Document Upload within Leaver Process

Active Members Report

Document Upload for 50:50 and CETV

Monthly Returns Pilot

Discussion

Poll: Do you use the Employer Hub? Yes: 95% No: 5%

Darren: overall the Hub is not user friendly. Doug advised it would be good if the document upload was not mandatory but optional (or mandatory only on certain types of leavers that do require document uploads, such as IHR) as adds confusion and frustration.

Chris asks if there are challenges which prevent using the Hub: Darren - full employee list to drill down through a member record without going round in circles. Is there a wish list of things we could provide in the future? Doug / Shaun: Deferred record details. Mateen Farooqy (Rosedale College) does starters, but leavers are too complicated, and they need to retain a copy of the submission, so complete paper copies instead.

Poll: Do you submit starters and leavers through the Hub? Yes: 56% No: 44%

Monthly Returns (Jonathan Brandrick)

File uploaded through the Employer Hub every month

Updates to earnings, contributions and some position changes

Separate leaver forms still required

Not i-connect

Update:

Summary: this is a file to upload each month and needs earnings and contributions, but can also make basic changes to 50:50 status and hours. Starters can also be uploaded via the file. Leavers cannot be done this way as we will almost always have service queries to query before leavers can be finalised online.

Doug: automatic validations or follow up queries by email? Currently a combination – validating earnings/contributions digitally, but manual queries such as missing leavers, also miscellaneous queries that the system cannot identify at the early stage.

Currently: Piloting April 2025-March 2026 then will review the information and lessons learnt, understand if further work required and collate the feedback received so far and development requirements before implementing. We are identifying some pain points, and we need to understand better whether this is improving the overall returns process. Primarily – is this going to improve resource costing and overall data quality vs Annual Returns? Is it easier to make corrections through the year? Doug feels that it will initially cause more queries but that should even out, and should ease the EOY process overall. Janet is a trial employer and is finding it OK.

Discussion

Poll: Do you prefer Monthly over Annually? Yes: 76% No: 4%

Why? Stephanie: sounds like it would be like doing an annual return every month. Jonathan agreed this feels like the case early on but that as the data improves throughout the year, it would ease. Jane says can we revert to Annual if necessary?

Mary asked if quarterly was an option.

Does anyone currently provide monthly returns to other pension funds? Mateen advised this sounds similar to MCR. Jon G advised it currently works well with TPS. Darren advised monthly is more controllable once you have steady reporting. Janet Heath does other funds, and all are monthly with no annual action needed.

Shaun advised most are monthly now and HPF are behind the curve. Jonathan advised that Monthly Returns are not a desperate need for us, in terms of improving our data quality, as the DQ is currently very good, but we are aware that it may improve the experience for some employers. Mateen – will there be video training before making the decision to go monthly?

Upcoming Events

2025 Valuation

PDP – we are connected, go live will be 2026. Employers must ensure their member info is accurate. Queries on data must be resolved very quickly! 10 working days to collate queries according to TPR including asking and receiving responses from employers. We intend to work closely with employers to get through this.

LGR

Consultations

Access and Fairness: Consultation has ended, outcomes pending.

Points (on slides).

Access and Protection Consultation

Jane B: will admitting councillors and mayors be voluntary? Jonathan: from the consultation - elected members will not be subject to auto-enrolment and, whilst each individual will have the right to join the scheme, elected members will need to assess whether they wish to do so

Any Other Business

Mary had a few comments from colleagues to pass along: Emails are going to individuals rather than shared email inboxes. They have found sometimes emails have been missed as whoever received it (individual) it has been out of office etc. Please can we check which email we use. Vicki agrees. Chris advised that we have our contact management system for deciding who to contact under which circumstances, but we can review these and see what potential issues are. Reminded them that staff should put out of office replies when they are on leave – so emails can be redirected.

Chris: Employers should only really be running estimates for redundancies / ill health – member general estimates should be directed to the Member Portal. The employer estimate training will include information on the Member Portal estimates as well to allow employers to give their staff the information and tools to run general estimates themselves.

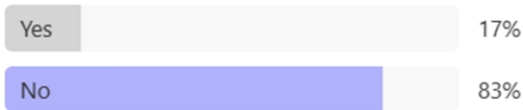
Stephanie: if we merged with another MAT, how do we decide whether to keep funds separate?

Jonathan – we keep each individual academy separate, to avoid issues in the future with unpicking data if one employer moved MAT. Monthly returns – their Surrey schools use i-Connect. Annual Return takes all of April to complete but this method works well. Nervous about monthly returns having no benefit to the Prospect Trust. Jonathan advised: The 10-day turnaround is tight for queries, Annual Returns might be difficult, but employers know what to expect and there is time to resolve data queries.

Presentation ended 11:33, AOB continued until 11:45.

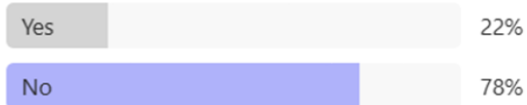
Polls – Focus Group, 12 November 2025

Have you attended one of the new training sessions or watched the online support videos?



18 responses

Do you run estimates for members on the Employer Hub?



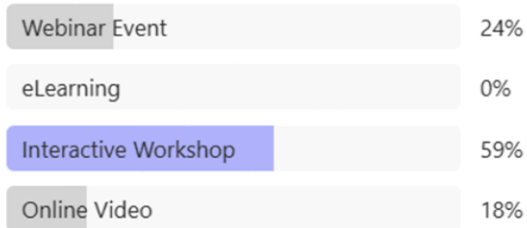
18 responses

Main reason for running estimates:
(Pick one)



15 responses

Preferred training format: (Pick one)



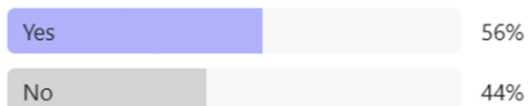
17 responses

Do you use the Employer Hub?



19 responses

Do you submit either starters or leavers on the Hub?



16 responses

Would you prefer monthly returns over annual returns?



17 responses