

Employer Focus Group

November 2022

Agenda:

- The annual return template review
- The annual return process review
- Annual return workshops
- Employer performance benchmarking
- The data validation exercise
- Future focus groups

Annual return template

- Are there any data requirements which are unclear? Are there any explanations which need clarification?
- Are there any other suggestions we could make on the template which would make it more user friendly for you as employers to use?
- [End of year template](#)

Annual return process

Annual return received

- By 30th April
- Chasers issued not received by this point

Initial checks

- Queries sent to employer for data formatting issues, reconciliation queries or to sign off
- Response required in 1 week

Upload of queries

- Queries sent to employers on query template
- Responses required within 2 weeks
- Completed query spreadsheet returned to EOY team

Query responses

- Query responses dealt with
- Annual return completed for the year

Annual return workshops

What we cover...

1. Requirements for your annual return submission, and how to complete it
2. Importance of annual returns and how they can impact you as an LGPS employer
3. Principles of pensionable pay which relate to the annual returns submission

Scenarios were confusing

Break out rooms were a good idea

In person works better

Good workshop, esp breakout exercises

Useful to understand different regs

Useful to know how to calculate pay

Any other feedback or suggestions for future annual return workshops?

Employer benchmarking

Timeliness:	Received by 30 April	Received in May	Received June onwards
Financial control	No reconciliation issues	Minor reconciliation issues and quickly resolved	Major reconciliation issues or slow to respond
Data quality	Queries on less than 2% of active members	Queries on 2-5% of active members	Queries on 5% plus of active members

Employer benchmarking process

- Letters issued to employers rated red in one or more area to raise concerns
- Letters issued to employers who had previously been rated red, however improvements noted
- Requirement for data validation exercise to do a check mid way through the year to focus on actions needed to ensure a better return the following year, as well as BAU processes to have improvements in future years
- Meetings with employers where ongoing concerns of 3 or more years

Employer Data Validation exercise

- HPS send active membership data for members recorded from 1st April to 30th Sept
- Employers/payrolls should check their own records to ensure all starters/leavers that should have been sent are up to date
- Where notifications are to be sent, organise for these to be sent ASAP and review processes
- Send just the declaration back (by 15th Dec), on current position and actions being taken

Employer Data Validation exercise

How useful do you as employers find this exercise?

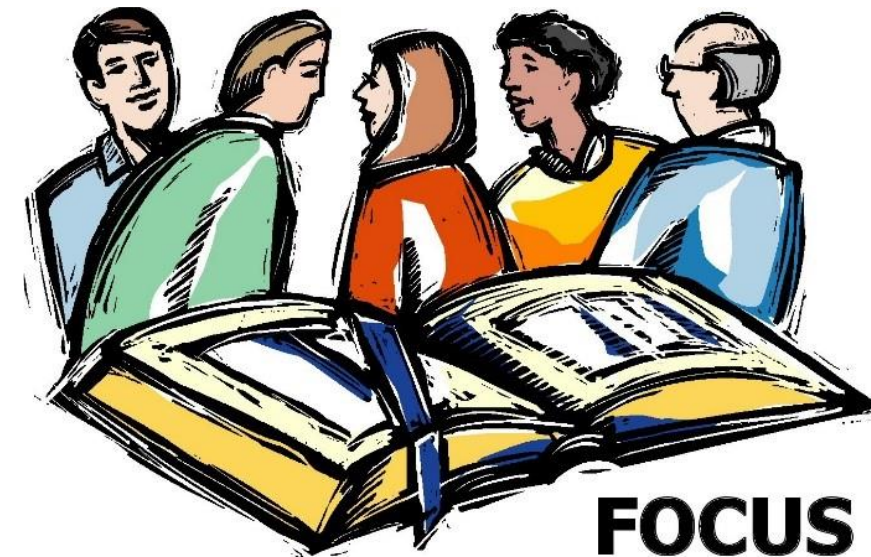
Is there anything in the format we provide the data which would make this easier?

What are the biggest challenges in undertaking this?

Are there any other comments/feedback?

Employer Focus Groups - purpose

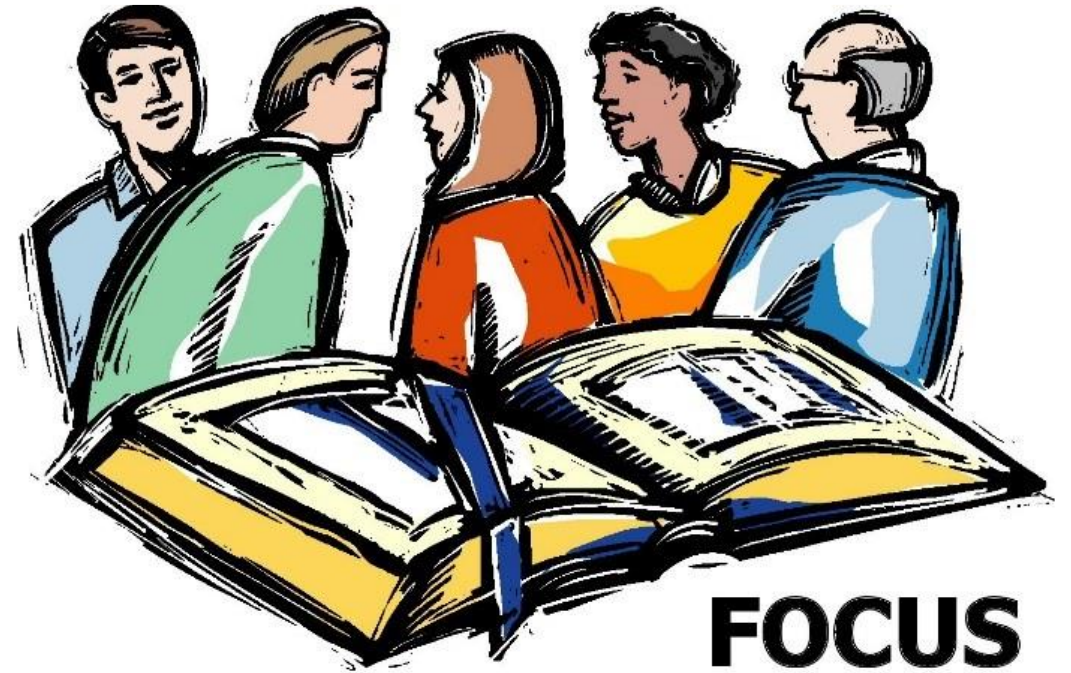
- Employer feedback to help improve member and employer communication
- Review of processes
- Review of documents for members and employers
- Opportunity for Pension Services to understand employer issues
- Help improve customer journey for member



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Future groups

- What do you like about the existing focus groups?
- What would you like to see we do differently?
- Any suggestions for future group areas of discussion?



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Any other comments, questions?