



## Edition 7 – August 2022

‘by the LGPS, for the LGPS’

### Welcome to the Summer Edition of our Newsletter.

Where is 2022 going? Our last bulletin back in January seems only 5 minutes ago and now we are already well into August! We hope you are managing to get a well earned break this summer.

As ever it has been a busy few months for the National LGPS Frameworks team with the launch of both the Stewardship Services Framework and the Pensions Administration Operational Support Services Framework. More information about both of these can be found in this bulletin.

Two further Framework procurements - Investment Management Consultancy Services and Legal Services - are also well underway, with many thanks to the Founders who are supporting these.

It has also been great to be able to catch-up with so many of you in person again either at the PLSA Local Authority Conference in June or at the LAPF Strategic Investment Forum in July.

We hope you find the News Bulletin informative. As always please do get in contact if you have any questions. Thank you for your continued support.

**Jo Quarterman,**  
 Director, National LGPS Frameworks

**Leon Thorpe,**  
 Head of Operational Services and Support

### Highlights in this edition...

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- All Services available
- Member Data Services update

**Page 3: new and coming soon**

- New Stewardship and Pensions Admin support f/w's now live
- New Inv Mgt Consultancy & Legal f/w coming soon

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- Procurement green paper

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### What the National LGPS Frameworks offer

The National LGPS Frameworks save time and money by reducing the time and costs associated with the procurement process by offering a facility that has already been competitively tendered. Each Framework also has a comprehensive set of user documentation to help you in your Further Competition or Direct Award. You can find further information on all Frameworks at [www.nationallgpsframeworks.org](http://www.nationallgpsframeworks.org) or by calling our helpline on **01603 306846**.

*You can see more about all the services available under current Frameworks later in the Bulletin.*

**IMPORTANT:** Please make sure you note the end dates of Frameworks when you are planning and preparing your call-off. If you are planning to use a Framework which is expiring this year, your Contract Award must be completed by the expiry date of the Framework (although contracts let under the Framework can be for longer periods).

## Services available via the National LGPS Frameworks

There are currently nine live National LGPS Frameworks available to all LGPS Funds, LGPS Pools and Employers and the wider public sector nationally for the procurement of pensions related services from a range of specialist qualified providers:

- Actuarial, Benefits and Governance Consultancy Services
- Global Custody Services
- **Investment Management Consultancy Services (expires October 2022)**
- Legal Services
- **Member Data Services (expires September 2022)**
- Pensions Administration Operational Support Services
- Pensions Administration Software
- **Transition Management and Implementation Services (expires November 2022)**
- Stewardship Services Framework

**IMPORTANT:** Please make sure you note the end dates of Frameworks when you are planning and preparing your call-off, especially if you are planning on using the Investment Management Consultancy Services, Member Data Services or the Transition Management and Implementation Services Frameworks in the coming weeks. If you are planning to use a Framework which is expiring this year, your Contract Award must be completed by the expiry date of the Framework (although contracts let under the Framework can be for longer periods).

For further information and services included regarding a particular Framework and joining information please refer to our website <https://www.nationallgpsframeworks.org/>. You can also contact our team via [nationalLGPSframeworks@norfolk.gov.uk](mailto:nationalLGPSframeworks@norfolk.gov.uk) or by calling our helpline on 01603 306846 and we will be happy to help you.

## Framework update - Member Data Services

The National LGPS Framework for Member Data Services is due to expire on 9<sup>th</sup> September 2022. Please remember that if you are planning to run a Further Competition via this Framework, your Contract Award must be completed by the expiry date of the Framework (although contracts let under the Framework can be for longer periods).



We are exploring the possible use of other, perhaps more suitable procurement vehicles to deliver the services provided under this Framework going forward. This means that there will be a gap in service between the expiration of this Framework and the commencement of any new procurement vehicle. We aim to have the best solution in place as soon as possible.

**If you have a query regarding the expiration of this Framework or any thoughts and ideas for the future of this Framework and the services it should cover these would be most welcome.** You can get in touch with us by email at [nationalLGPSframeworks@norfolk.gov.uk](mailto:nationalLGPSframeworks@norfolk.gov.uk) or by calling our helpline on 01603 306846.

## Website News

The National LGPS Frameworks website has recently undergone a series of tests and updates, to improve security and user experience, and to ensure that the site is working to its full capacity. This included a penetration test undertaken by a government accredited company.



If you experience any issues with the website, or if you would like access to the secure Document Portal, please contact the Frameworks team.

## Latest Frameworks Recently Launched

The beginning of 2022 has been a busy time for the National LGPS Frameworks– since our last Bulletin back in January, with the support of Funds and Pools acting as Founders, we have launched two new Frameworks (Stewardship Services and Pensions Administration Operational Support Services) and kicked off the procurement process for the new Investment Management Consultancy Services Framework (planned to be available in November 2022) and Legal Services Framework (planned to be available in January 2023).



### **Stewardship Services Framework**

The second iteration of this Framework went live in May 2022 and will be available for Further Competition and Direct Award until 31 March 2026.

There are 11 Providers on the Framework split across four Lots. The Framework now includes a Lot designed for Stewardship Reporting and Projects (Lot 4) where you can Direct Award to a chosen Provider:

- **Lot 1:** Voting Services
- **Lot 2:** Engagement Services
- **Lot 3:** Voting and Engagement Services
- **Lot 4:** Stewardship Reporting and Projects

To find out more details about the services available through the Framework then please visit our website by clicking [here](#).

### **Pension Administration Operational Support Services Framework**

This new Framework builds upon some of the most used services within the earlier Third Party Administration Services Framework. The Framework went live in May 2022 and will be available for Further Competition and Direct Award until 30 April 2026.

There are 14 Providers on the Framework split across two Lots.

- **Lot 1:** Pensions Administration Operations Services
- **Lot 2:** Specialist Pension Communications and Engagement Services

To find out more details about the services available through the Framework then please visit our website by clicking [here](#).

## Frameworks Launching 2022/2023

The Procurement process has already kicked off for a couple of Frameworks which will launch in 2022 and early 2023, these are:

- **Investment Management Consultancy Services Framework 2022**

This is the third iteration of this Framework. We are in the process of letting this Framework, which we hope will launch in November 2022. This will replace the current Framework which is due to expire in October. The new framework will include an additional Lot for Investment Management Cost Monitoring and Reporting which was previously included in the expired Investment Management Performance and Cost Monitoring and Reporting Services Framework

- **Legal Services Framework 2023**

This is also the third iteration of this Framework. We are in the process of letting this Framework which we hope will launch in early January 2023 upon expiry of the existing Framework.

We will keep you updated with progress on both of these Frameworks over the coming months. In the meantime, if you would like to get in touch with us about any of the Frameworks mention above, please contact us using our contact details which can be found at the bottom of this Bulletin.

## Global Custody Services Framework - Form X update

In February this year, the National LGPS Frameworks team worked with technical advisors Mercer Sentinel to update the Form X scores for each of the providers on the Global Custody Services Framework.



When the Framework was first set up, Mercer independently evaluated and scored each Service Provider, based on the technical proposals submitted in Providers' applications to join the Framework. These scores are then provided to users of the Global Custody Services Framework to assist them with their Further Competitions, so a yearly refresh of the scores occurs in order to ensure that information is completely up to date.

The new scores for the providers have been updated and are now included in the documentation for the Global Custody Services Framework, so users can use these to inform their decisions when running a Further Competition.

If you are looking to run a Further Competition through the Global Custody Services Framework, please make sure you have the latest issue of the documents. Please contact us if you are unsure if you have the latest version, or if you would like any information on the Global Custody Services Framework.

## PLSA Viewpoint Summer Article 2022

The Team were delighted to contribute an article for the Summer 2022 PLSA Viewpoint online publication celebrating 10 years of successful collaboration 'By the LGPS, For the LGPS'.

The article looks back to 2012, the year the Queen celebrated her diamond jubilee and we all enjoyed the London Olympics. It was also the time when the LGPS responded to the Lord Hutton Independent Public Services Pensions Commission report published in 2011. One of the recommendations in the report was for greater collaboration between Pension Funds — and in 2012 the first National LGPS Framework was let!

Over the last 10 years Funds and Pools, supported by the National LGPS Frameworks team, have worked together to offer a total of 18 Frameworks (nine expired and nine live) and currently have two Frameworks being re-let, with 99% of LGPS Funds and all LGPS Pools accessing at least one of the Frameworks.

You can read the full article on pages 31 and 32 <https://www.plsa.co.uk/Viewpoint/Read-online>.



## Recently awarded a contract?

If you have recently awarded a contract under a National LGPS Framework please let us know by emailing [nationalLGPSframeworks@norfolk.gov.uk](mailto:nationalLGPSframeworks@norfolk.gov.uk)



This helps us monitor the amount of work going through each Framework along with ensuring any rebate (Framework dependent) due to users can be correctly distributed at the end of each financial year.

## Transforming Public Procurement

The recent introduction of the Public Procurement Green Paper to the House of Lords has resulted in an increased focus on the subject matter.

At the National LGPS Framework team, we are also following the progress of the Green Paper. The Bill is currently at the Committee stage with a proposed 'go live' date of 2023 at the earliest. Whilst the drafting may change during the Parliament transition, a summary of the Bill has been published to the gov.uk website [The Procurement Bill - a summary guide to the provisions - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/114444/Procurement_Bill_-_a_summary_guide_to_the_provisions_-_GOV.UK) This first stage of the Bill addresses the primary legislation, with the secondary legislation to follow prior to the Royal Assent.

## Pensions Dashboard readiness

### Integrated Service Provider requirements for the Pensions Dashboard Programme



We are mindful of the progress with the Pensions Dashboard programme and have written to all providers on the Pensions Administration Software Framework asking them to confirm their intention to become an Integrated Service Provider (ISP) in this context.

We have also asked them to share more detail about their proposed offerings including:

- any requirement for ISP specific Terms and Condition (above what is currently contained within the Call-off Terms and Conditions for the existing Pensions Administration Software Framework)
- estimated timescales for availability
- Implementation and running costs

We hope to provide a further update to PAS Framework users later this month.

## Go Awards



The National LGPS Frameworks team were delighted to be shortlisted for 'Procurement Team of the Year - Other Organisations' at the 2022 UK National GO Awards.

The award ceremony was held at the Hilton Metropole Birmingham on the 25th of May and hosted by TV presenter Holly Hamilton, and a fantastic night was had by all!

While we were disappointed not to win, we are proud to have been shortlisted and to achieve recognition for the hard work done by the team and by the wider Founder group. At next year's awards, we will be aiming to come back with the trophy!

## National LGPS Framework welcomes new team members

Due to the continued growth of the project, the National LGPS Frameworks have recently recruited two new team members, who joined the team in April and May this year.

Aaron Copeman and Emma Riley have joined the team as National LGPS Framework Officers. You will get to know them more over the coming months but we would like to take this opportunity to introduce them and give them a big welcome to the Team!

### Aaron Copeman



I have recently joined the National LGPS Frameworks team as a Frameworks Officer. To date I have been following a Procurement career path within the private sector. A key part of my previous role was to deliver value to the stakeholders and to navigate the, often tricky, supply of raw materials.

Last year I completed the CIPS Diploma qualification and have recently started the next level. The industries I have previously worked in are Engineering, Agriculture and Construction so Pensions is a new area for me. I look forward to working with you all.

### Emma Riley



I have recently joined the National LGPS Frameworks team as a Frameworks Officer. My working background has been predominantly in Pensions. Prior to this new role, I worked for the Local Government Pension Scheme here in Norwich, in the Member Services team for 17 years.

I have a good knowledge and understanding of the LGPS having seen the scheme develop and change over the years. I am excited to begin working within the procurement team and I look forward to meeting and working with you!



## The National LGPS Frameworks Team



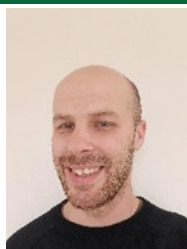
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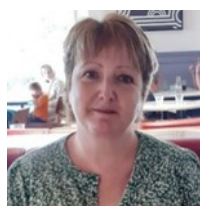
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### Want to know more?

If you would like to find out more about the Frameworks mentioned above, or any other National LGPS Frameworks please visit <https://www.nationallgpsframeworks.org/> or contact us on the details below.

We also have a news section on our website where you can keep up to date with news articles we publish, along with the entire back catalogue of National LGPS Frameworks news bulletins!



[www.nationallgpsframeworks.org](http://www.nationallgpsframeworks.org)



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