

# Scheme Advisory Board

## Hybrid Meeting – 24 November 2025

### Item 8 – Paper D

#### Peer support project update

1. This paper gives an update on the work of this project since the last Board meeting in July 2025 and seeks approval to move to the next stage, which is to run some pilots. The paper also asks the Board to approve a budget to undertake these pilots ahead of moving to a self-funding model. The budget sought is £45,000 in the levy for year 2026/27 and £30,000 for the 27/28 levy.

#### Working group update

2. Since the last Board meeting in July 2025. The working group met on 15 September 2025, and a project update was provided at the Compliance and Reporting Committee on 20 October 2025.
3. The group discussed the different framework options and agreed that factors around the framework should be clear, consistent but with some flexibility. A proposal was made on how the existing Local Government Association's (LGA's) five core themes used in their Corporate Peer Challenge could be applied to the LGPS:
  - Local priorities and outcomes
  - Organisational and place leadership
  - Governance and culture
  - Financial planning and management
  - Capacity for improvement
4. The group agreed that these existing LGA themes, recognising their proven success in supporting sector-led improvement within local authorities could largely be applicable to the LGPS. However, it was suggested that these themes are adapted to reflect the specific context of the LGPS missing within these topics, such as a specific LGPS stakeholders and partnerships. A suggestion of these adapted themes is below:
  - Fund priorities and outcomes
  - Fund leadership, stakeholders, and partnerships
  - Governance and culture
  - Fund performance and management
  - Capacity for improvement
5. Other main themes of discussions were questions and comments on the following:
  - How to make the process iterative but consistent.
  - If the interface with the investment pool would be covered in the

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# Scheme Advisory Board

- framework.
  - Value for Money being included in the framework and the issues around this.
  - Sharing results following the peer support.
  - The language and communication around the peer support offer to funds
6. The working group agreed that additional communication with funds is essential to improve understanding and engagement with peer support and to clarify how it differs from the Independent Governance Review. To support this, the group proposed developing communication resources, such as presentation slides, leaflets, case studies, flow charts, and newsletter content, for fund officers to use in Board and Committee meetings. Work is underway to explore these options.
  7. Attendees also endorsed continued use of the LGPS Bulletin and Board website as key channels for promoting and explaining the peer support offer.

## Peer support pilot proposal

8. At the Board meeting in July 2025, it was agreed that budget to support piloting of the peer support offer from the Board's levy should be identified. An amount for this has been included in the outline budget in item 15 to be agreed by the Board for 2026/27.
9. The working group supported the idea of a pilot to be organised in early 2026 and funds within the working group interested in taking part in this were invited to volunteer. It was noted however that the exact timings of a pilot need to be carefully considered around the other demands on resources within funds during early 2026, which may limit officer, board, and committee time. The Secretariat agreed to factor this in when scoping out a pilot proposal.
10. Following this support, the Secretariat have been developing a proposal for Board approval. To learn from LGA colleagues who already deliver peer support events, the Secretariat met with LGA Corporate Peer Challenge (CPC) colleagues in September 2025 to discuss the support and expertise which could be provided including support when delivering a pilot but also help shape approach and methodology. A pilot proposal can be found at **Annex A** for discussion by the Board and approval.

## Communication activities around peer support

11. The July episode of the Board's webinar series 'LGPS Live' was focussed on governance, and polling questions were put to the audience on peer support. Results from this poll provided insight into how the Secretariat needed to communicate more widely to funds. Results from the polls are shown in **Annex B**. The Secretariat also launched a survey in August 2025 on how the peer support offer is currently understood, where it could add value and what involvement will look like in practice. Results of this survey can be found in **Annex C**.
12. As part of the new website project, the Secretariat have allowed for a

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# Scheme Advisory Board

dedicated projects page to be included to support communication and engagement with key projects. We expect to place here the key documents and background papers on peer support.

13. The Secretariat delivered a presentation on the Board's peer support project at the Annual Assembly (attended by over 80 Pension Committee and Board Chairs). Presentations were also provided by LGA colleagues sharing how the LGA's flagship corporate peer challenge peer support was rolled out across councils, as well as a presentation on the Planning Advisory Service's planning peer challenge. Following this presentation, the Secretariat have been contacted by six funds expressing their interest in peer support. The peer support project will also be discussed at the LGPS Governance in January 2026.
14. At various events over the last quarter where the Secretariat presented Board updates, we also took the opportunity to highlight peer support.

## Project overview

15. The below initial milestones were agreed in February 2025 and have evolved as the deliverables are identified. The Secretariat regularly review these milestones as latest information emerges.
  - November 2024 – Board approval of workstream **(completed)**
  - January 2025 – March 2025 – project scoping, including creation of working group and initial engagement with MHCLG on proposals **(completed)**
  - March 2025 – Terms of Reference and other project documentation proposed to the Board **(completed)**
  - April, June, and September 2025 – working group meetings arranged **(completed)**
  - June 2025 – initial findings presented to CRC **(completed)**
  - July 2025 – project update to Board **(completed)**
  - October 2025 – draft framework and models of a LGPS peer support offer, including consideration of budget, communication requirements, and other constraints **(completed)**
  - November 2025 – project proposal, including budget, presented at the Board meeting **(delivered as part this update)**
  - January – March 2026 pilot launched **(ambition)**
  - April 2026 – project roll out **(ambition)**

**Recommendation** - That the Board notes the progress of this workstream, agrees to move to the next stage and arrange some pilots, as well as approving inclusion of amounts in the levy to provide a budget for this.

# Scheme Advisory Board

## Annex A – Peer support pilot proposal

**This document has been drafted to outline the Secretariat's thoughts on how a peer support pilot event could be developed. The main contents could also be used to produce an information leaflet to share with funds interested in a pilot.**

### Introduction to peer support

16. Peer support is a constructive and supportive process with the central aim of supporting improvement. It is not an inspection, nor does it award a rating or score. It is delivered from the position of a 'critical friend' to promote sector led improvement. Peer support is a learning process and will help a funds assess their current achievements and to identify areas where improvements or developments can be made. We know from LGA experience that peers learn as much from the process as the organisation receiving the support.
17. Peer support involves exploring the ambitions, performance, and delivery structures of a fund in a supportive way. This helps to build a common purpose by reflecting on the present situation and future journey by offering ways forward. There should be no surprises in the process and information is collected on a non-attributable basis seeking to generate honesty and drive improvement.
18. The proposal for LGPS specific peer support – derived from the proposals in the Board's original Good Governance Report and was included in the Government's the Fit for the future consultation and subsequent response issued on 29 May 2025.
19. It is recognised that funds may seek peer support either in preparation for the newly proposed Independent Governance Review (IGR), in response to recommendations made in an IGR or for some other reason. The IGR and peer support are separate processes but may be related to each other, for example undertaking peer support may be an option to assist funds with IGR recommendations or indeed be identified as a potential outcome of an IGR. Therefore, while IGR may be one route into peer support, it is crucially not the only route.
20. There are many other reasons for accessing peer support, not linked to an IGR, and therefore it is envisaged that funds will self-refer via the LGPS Senior Officer, pension committee, or pension board.
21. These objectives have been set for what a LGPS Peer Support offer could achieve:
  - Allow LGPS administering authorities (AA's) to gain external assurance support of its governance activities.
  - To share, promote and increase good governance practices.
  - To facilitate access to an expert network of LGPS peer members

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## Pilot objectives

22. The pilot will assess the suitability and impact of a peer support model within the LGPS, test objectives against the proposed framework and engage the sector for evaluation and learning. It will also trial operational procedures for LGPS peer support, identify potential issues early to mitigate those risks before wider rollout. The pilot will focus on the below key areas to guide implementation, evaluation, and decision-making of wider peer support roll out:

- Identify and mitigate risks before full implementation.
- Evaluate benefits and impact on fund governance.
- Gather participant and stakeholder feedback to inform improvements.
- Use findings to refine processes, communication, and support structures.
- Support strategic decisions with input from LGPS peer experts.
- Ensure policies and processes strengthen good governance.

## Framework

23. The LGPS peer support working group agreed to recommend using these existing LGA themes, recognising their proven success in supporting sector-led improvement within local authorities and their applicability to the LGPS:

- Fund priorities and outcomes
- Fund leadership, stakeholders and partnerships
- Governance and culture
- Fund performance and management
- Capacity for improvement

24. Although the pilot will run using the above proposed framework, there will be an opportunity to add a specific theme according to the individual fund's requirements.

## Roles and responsibilities

25. A peer support team should be composed of fund officers, pension committee and board members who have volunteered to offer advice and guidance based on their skills and experience. It is expected participation from the fund receiving the pilot would be required from:

## Example peer team

- Head of Pensions (i.e. the LGPS Senior Officer)
- Other senior officers with specific skills relevant to peer support
- Pension Committee Chair
- Pension Board Chair
- LGA peer support manager

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26. The Board Secretariat will play a leading role in shaping and supporting the delivery of the pilot by coordinating the event and providing administrative support. This includes facilitating communication between the host fund, peer team, managing logistics/timetable and maintaining documentation throughout the pilot period.
27. It is expected that the administrative support for this pilot event can be delivered with the current resources available within the Secretariat Team (headcount of which was increased last year to deliver this project). The LGA have indicated that support in the form of providing an experienced Peer Support Manager who will both facilitate the event and assist with the pre-briefing work will also be available, although we will need to meet the costs of this person's participation. Administrative and operational support from the host fund (such as room bookings, co-ordinating pre-briefings etc) will also be required.

## **Approach**

28. It is proposed that the pilot peer support would be delivered in-person to allow for an open, dedicated discussion. This approach supports the value of face-to-face engagement where fund officers, pension committee and board members can talk freely and openly with trusted peers. However, it is recognised that many fund teams have remote or home workers, so this would need to be considered by the Board Secretariat in terms of appropriateness of venue. As a pilot event, it is essential that the peer team to have the opportunity to come together and therefore replicate preferred method of in-person delivery. However, preparation meetings can be offered virtually.
29. The final timetable for the pilot will be agreed by the Board Secretariat and the host fund.

## **Peer team preparation and pre-onsite activity**

30. The Board Secretariat will arrange preparatory meetings and training for the peer support team.
31. The peer team will receive key briefing information provided by the host fund, including a short position statement and details of the main aims for the peer support event. To ensure a rich and purposeful experience, the Board's Secretariat Team will work closely with the fund in advance to collect the necessary information. Through an initial scoping meeting it will be essential to understand specific objectives, current challenges, and desired outcomes. The host fund will also be asked to signpost relevant documentation, such as pension board and committee reports, fund performance data, and applicable policies and strategies. This will enable the peer team to prepare thoroughly, including meeting beforehand to review background materials and identify key themes, issues, and areas for further exploration.

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## **Onsite activity and role of peers**

32. Depending on the exact remit of the peer support, the on-site activity could last up to 2.5 days where the peer support team will need to be onsite at the host fund.
33. During the onsite engagement, a series of individual and group meetings will be held to enable peers to fully understand what the fund has done well and what it can improve. Peers normally work in pairs to facilitate meetings. Meetings will provide an opportunity for discussion, which explores issues, as much as evidence gathering. Peer team members will be allocated to a particular meeting or session and will be responsible for leading the discussion. After each session, key notes after each meeting will be collated and fed back to the facilitator and the rest of the peer group.
34. All the information that the peer support team obtains from various discussions with people during the event is non-attributable to individuals. This should be emphasised at the start of every interview and focus group. It is vital for the credibility of the peer support that the peer team establishes a climate of trust in which people feel they can be open and honest.
35. The findings of the peers will then be shared with the fund verbally at the end of the onsite work, followed by a report afterwards, providing the fund with a clear set of recommendations and actions, which we encourage the fund to publish.

## **Budget and administration of the event**

36. The Secretariat have allowed for peer support pilots to be funded for two years in the 2026/27 and 2027/28 budget to allow the cost, process, and demand of a scheme-wider roll out to be fully understood. Peer support pilots will be funded for two years before moving to a longer-term model (which is to be decided following the pilot)
37. For the pilots, all reasonable travel, accommodation, and subsistence expenses incurred while engaged in peer support work will be covered within the budget set and in line with the LGA expenses policy. After the pilot, an assessment will be undertaken whether any specific LGPS requirements need to be added to create a specific LGPS expenses policy.

## **Pilot success measures**

38. To measure the pilot's success and learning, feedback will include host fund feedback, post event interviews with the host fund and peer support team to evaluate satisfaction and the overall effectiveness of the process. Indicators such a budget spent and Secretariat time to deliver support will also be monitored.
39. Findings from the pilot will be compiled into an evaluation report and used to assess the pilot's effectiveness, scalability, learning points and alignment with broader policy goals. Recommendations will be drawn from

# Scheme Advisory Board

the evaluation report to inform future programme development and potential wider rollout.

## **Annex B – LGPS-Live Webinar 23rd July 2025 Poll Results**

### **How familiar are you with the concept of peer support? (29 responses)**

Very familiar - I actively use or contribute to existing peer networks **17.2%**

Heard of it, but not sure what it involves **62.1%**

Not familiar at all, this is the first I have heard about peer support **20.7%**

### **What do you see is the main benefit of peer support in the LGPS? (35 responses)**

Sharing knowledge and best practice **42.9%**

Building confidence in complex or changing areas **5.7%**

Reducing isolation in roles **5.7%**

Learning from others' experience **14.3%**

Strengthening consistency and compliance across the scheme **31.4%**

I am not sure what peer support is **0%**



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## Annex C - LGPS Board survey results: Understanding diversity of representation and Peer Support insight

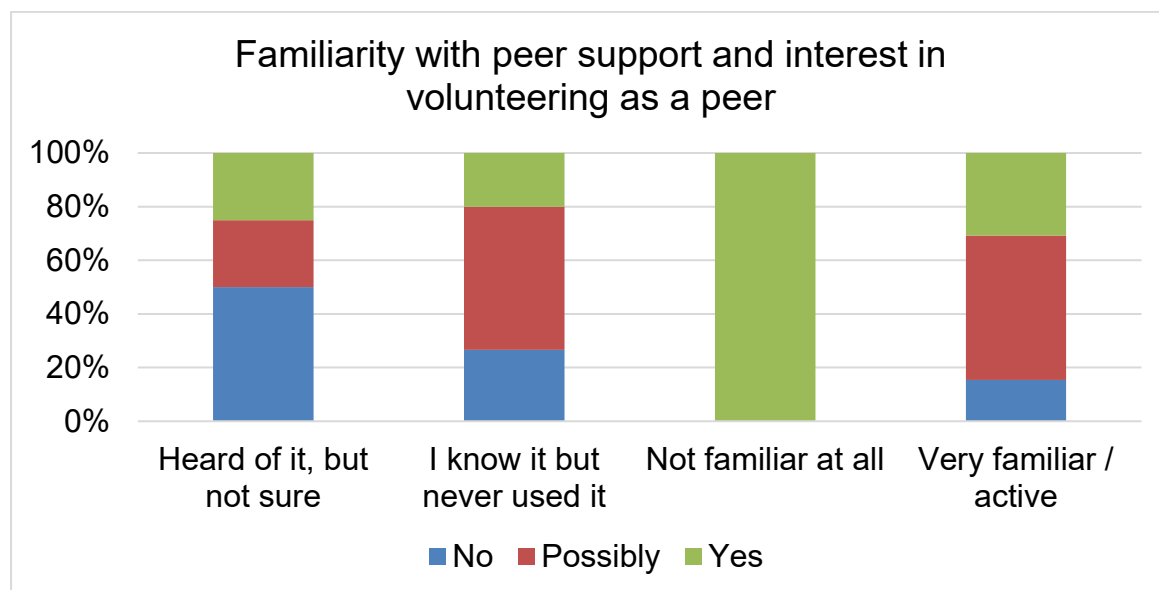
### Findings

40. The survey was distributed to pension fund managers and received responses from 38 funds, a response rate of 44 per cent.
41. When looking at familiarity with peer support networks, most of the respondents (80 per cent) reported that they are already aware of what peer support is, with over a third being very familiar and already actively involved in peer support networks. Only one respondent said that they had not heard of peer support networks at all.
42. Respondents were asked what they believe to be the main benefit of peer support in the LGPS. Responses can be seen in the table below. Most respondents (66 per cent) said they believe the main benefit to be sharing knowledge and best practice. Only one respondent said, “building confidence in complex or changing areas” and one answered that they were not sure of what peer support is.

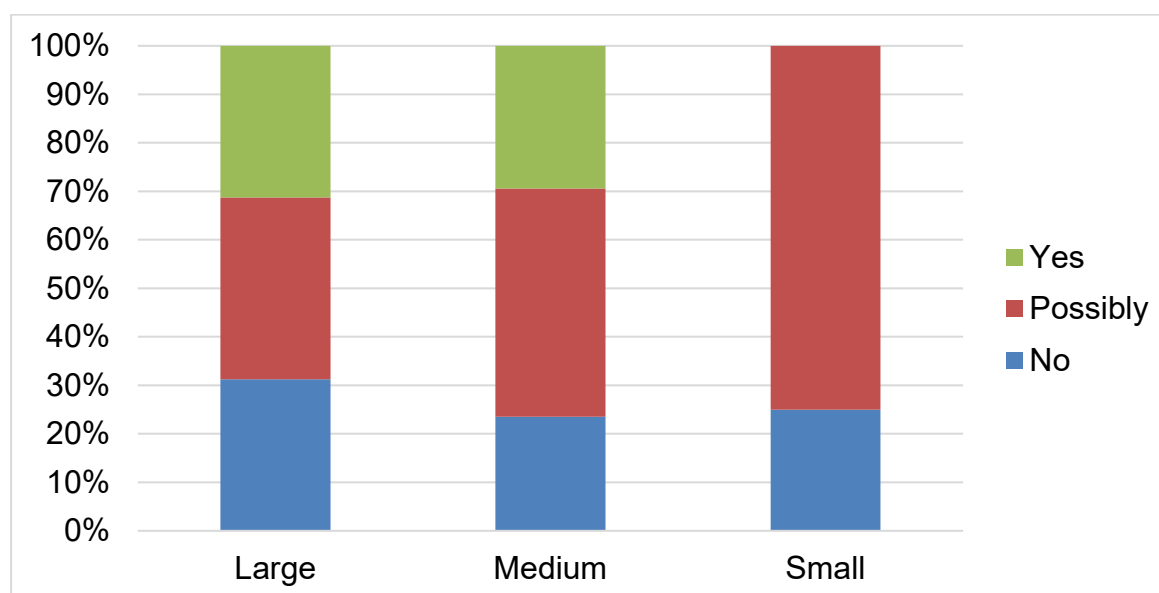
Peer Support Benefit	Count	Percent
Sharing knowledge and best practice	25	66%
Strengthening consistency and compliance across the scheme	8	21%
Learning from others' experience	3	8%
Building confidence in complex or changing areas	1	3%
I am not sure what peer support is	1	3%

43. There was a lot of interest from respondents in finding out more about volunteering as a peer. Just over a quarter (26 per cent) said “yes” to finding out more about volunteering as a peer in their role, almost half (47 per cent) said “possibly”, and just over a quarter (26 per cent) said they were not interested. In addition to this, there was also lots of interest in funds volunteering as part of a pilot scheme – 80 per cent of respondents said yes or possibly, with 20 per cent saying that their fund would not be interested.
44. There is a pattern between familiarity with peer support networks and interest in finding out more about volunteering as a peer. Among those who are very familiar and actively involved in peer networks, the majority (11 out of 13) expressed interest, either answering “yes” or “possibly.” Those who know what peer support is but have never used it lean heavily toward “possibly” (8 out of 15), indicating openness but also uncertainty. Respondents who have only heard of peer support but are unsure what it involves were more likely to say “no” (4 out of 8), and only two said “yes”.

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45.31 per cent of the large funds and 29 per cent of the medium funds that responded said that they would be interested in volunteering as a peer, while none of the small funds that responded said “yes”. This suggests that resource constraints or capacity concerns may influence smaller funds’ decisions.



Small fund – less than £2.5bn assets

Medium fund - between £2.5bn--£5bn assets

Large fund - above £5bn assets

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## Conclusions

46. Although it was small sample and a brief survey, the results show strong awareness of peer support across LGPS funds, with most respondents familiar with the concept and many already engaged. Sharing knowledge and best practice is seen as the main benefit, reinforcing the value of a collaborative approach and well suited to the whole scheme aim of improving governance.
47. While interest in volunteering and pilot participation is high, uncertainty remains about what involvement entails. Familiarity strongly influences willingness to volunteer, and medium and large-sized funds appear the most engaged overall, small funds lean towards “possibly,” suggesting resource concerns and wanting to understand more about what the role would entail.

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