Compliance and Reporting Committee (CRC) Meeting
2 November 2026 11.00am
Room 6.5, 18 Smith Square, London and Microsoft Teams

Paper D: Peer support project

Key points to note

The LGPS Peer Support programme continues to make progress despite the postponement of the first pilot with the London Borough of Camden due to local by-elections. Prior to the postponement, a peer team was successfully recruited and preparatory work undertaken with an experienced LGA Peer Challenge Manager. Interest in the programme remains strong, with a second fund expressing interest in participating as a pilot and sufficient demand from prospective peers to establish a waiting list for further training. Work has also begun on developing a central peer database to support peer recruitment, matching, availability tracking and conflict management as the programme expands.

Preparatory work for the pilot has helped refine the proposed peer selection framework, including role-specific criteria for Pension Committee members, Local Pension Board members and LGPS officers.

Our engagement with the LGA Political Group Offices (PGOs) has developed considerably through this work, and we have now established good relationships with them. They have been particularly valuable in identifying experienced Pension Committee members not previously known to the Secretariat. They will also have an important role in the selection of member peers, so establishing a collaborative approach to member peer recruitment will be key.

In parallel, feedback from the working group has shaped the programme documentation, FAQs and communications materials. While longer-term funding options and the relationship between peer support and Independent Governance Reviews continue to be developed, the immediate priority remains delivering and evaluating the pilot programme to establish proof of concept and inform future decisions on wider rollout and sustainability.

Background

The proposal for a LGPS specific peer support offer derived from the proposals in SAB's original Good Governance Report initial objectives were agreed at the 24 June 2024 CRC meeting and the Board agreed the project governance proposal when it last met in March 2026. The objectives for LGPS peer support are:

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- To allow LGPS administering authorities (AA's) to gain external assurance support for its governance activities
- To share, promote and increase good governance practices
- To facilitate access to an expert network of LGPS peer members

Recommendation

That the committee notes the progress made on this workstream.

Project summary

Pilot delivery

We had set dates for our first pilot with Camden in September 2026 and recruited a peer team to undertake the pilot compromising of:

- Pension Committee Member
- Local Pension Board Vice-Chair
- Local Pension Board Member
- Head of Pensions and Treasury Investments

Planning meetings were also undertaken with an LGA peer manager who has significant experience delivering corporate peer challenges across local government and who would facilitate the pensions-specific programme.

Due to the Camden October 2026 by-elections, the pilot was postponed. The preparatory work undertaken remains relevant and we are now working with the fund to identify an alternative suitable date.

We have also been approached by another fund who are interested in being our second pilot fund. Initial discussions have begun to explain the peer support offer, what participation would involve and to answer questions about the process. We also have a waiting list for a 2nd peer training event.

As the project grows along with a trained list of peers, we have started looking at how we can develop a central database which will support the management of the LGPS peer network. The database should capture key information on each peer, including their experience, skills, training, availability and peer support activity. This will help match peers to assignments, manage conflicts of interest, monitor participation and support the development of the programme

Peer team selection

Although the pilot was ultimately postponed, the preparatory work undertaken to assemble the peer team proved invaluable in testing and refining the proposed peer selection process. This provided the Secretariat with an early opportunity to apply the recruitment and matching approach in practice, helping to identify the key factors involved in building an effective peer team. The experience has strengthened our understanding of the importance of maintaining accurate peer data, developing a diverse and well-connected peer network, and ensuring that peer skills and experience can be effectively matched to the needs of individual funds. These lessons will help inform future pilots and the wider rollout of the peer support programme.

Current proposals are for a standard peer team to comprise the following roles: a LGPS Senior Officer, Local Pension Board member and Pension Committee member (ideally but not necessarily the chair), with flexibility to tailor the composition to the needs of each event. The secretariat would maintain responsibility for identifying and selecting peers from a trained peer pool, taking account of relevant experience, expertise, availability and potential conflicts of interest.

This approach recognises that the secretariat does not currently hold comprehensive information on all Pension Committee members across the LGPS and that PGOs can provide valuable insight into members' experience, skills and suitability as peers. It is intended over time to develop proposals for the secretariat to have access to better and more up-to-date information on who sits on pension committees.

Engagement with the PGOs during preparation for the pilot phase proved particularly beneficial, enabling the identification of experienced Pension Committee members who were not previously known to the Secretariat. The model therefore seeks to combine the Secretariat's understanding of LGPS peer support requirements with the knowledge and networks of the PGOs.

The proposed peer selection framework is now taking shape, with draft eligibility criteria and matching arrangements developed for each peer role. However, successful implementation will depend on further development of the supporting peer infrastructure. This includes establishing and maintaining an up-to-date peer database, expanding the pool of trained peers through targeted recruitment and engagement activity, and working closely with administering authorities to identify individuals with the appropriate skills and experience. Further work is also required to finalise the peer selection methodology and clarify the roles of the Secretariat and PGOs in supporting the appointment process before the programme is rolled out more widely.

Working group engagement

The working group met on 13 July 2026 and were invited to provide feedback on a suite of draft documents developed by the Secretariat. These documents are intended to support both LGPS peers participating in the programme and administering authorities receiving peer support. An overview of each document and its intended purpose is set out below. The working group was asked to consider whether the documents addressed the key information and issues that participants would expect to see covered, both from the perspective of a host fund and a peer. Members were also invited to comment on whether each document successfully met its stated objectives and purpose.

1. **Draft LGPS Peer Support Induction Pack (pre-training)**
   This induction pack will be provided to individuals who volunteer to become peers and will be issued prior to training. Its purpose is to provide an overview of the peer role and the peer support programme.

- Does it provide a clear and comprehensive overview of the role of a peer?
- Are there any important areas or information that are missing?

2. **Draft LGPS Fund Guidance**
   This guidance is intended for pilot funds participating in a peer support event.

- If your fund were receiving this guidance, would you have a clear understanding of the peer support process?
- Does it explain what participating funds can expect and the information they will be required to provide? In particular, is the list of documents requested from funds appropriate and does the position statement guidance provide sufficient detail.

3. **Draft Peer Team Guidance Note (post-training)**
   This guidance is designed to support peers before and during a peer support event. It will be tailored and issued to the peer team once an event has been confirmed.

- Does it provide the information and support that you would expect as a member of the peer team?
- Are there any additional areas that should be covered?

4. **Peer Support Framework**
   This framework outlines the broad themes of a peer support event and is intended to provide a consistent structure on which each review can be based.

- Does the framework cover the right areas?
- Are there any themes or topics that should be added, removed, or amended?
- There is also an open question on the use of this framework during the implementation period of some of the new statutory requirements and post implementation.

Following our request for feedback from funds on the peer support documents, we received valuable and constructive challenge to the proposed approach. Several common themes emerged, including the publication of reports, the costs associated with peer support and the challenge of recruitment of knowledgeable and experienced peers appeared. We have also asked the group to help us reach any networks, events, newsletters or other channels that could help us reach both peer and fund volunteers.

Communications

In response to the working group's feedback and to ensure we are able to be clear about the peer support offer, we have also published Frequently Asked Questions to help with both communications around the project and to address the feedback we have received. The questions (and responses) were taken from those frequently asked when developing the peer support documentation as well as the presentations we have provided at events and committee and board meetings.

We are looking to develop a develop communications to promote the peer support offer and are considering producing a short video of a peer discussing the importance and value of being a peer could help raise awareness of the offer and encourage others to get involved.

At the Independence Governance (IGR) workshop referred to in paper B there was feedback that peer support could be a helpful means for funds to share findings and practice following an IGR.

Longer-term funding models

At its July 2026 meeting, the Board requested further consideration of the longer-

term funding model for LGPS peer support, specifically the relative merits of funding the programme through the levy compared with recovering costs from participating funds. The Board agreed that a future budget paper should set out the advantages and disadvantages of each approach and include a recommended option. It was intended that a proposal was to be brought to this committee meeting for consideration. This timetable would have enabled our recommendation to be informed by learning from the initial pilot, particularly around the practical delivery model, resource requirements and likely cost compared to the budgeted amount. However, as the pilot was postponed, the Secretariat has not yet been able to gather the operational evidence needed to fully assess the implications of the different funding approaches and test proof of concept.

The secretariate acknowledges that the future funding arrangements are an important part of the programme's long-term development, so the current priority is to successfully test and evaluate the peer support model through the pilot phase. Based on experience to date, we are now planning for a longer pilot stage, funded through the levy as previously agreed, so that we have a stronger evidence base to inform eventual decisions on sustainable funding arrangements for the wider roll-out.

Further work on funding options will therefore continue alongside pilot delivery and evaluation, with recommendations being brought forward once practical experience of the model has been gained.

Independent Governance Reviews (IGRs)

It is welcome that the governance statutory guidance identifies peer support as a potential mechanism for supporting governance improvement and addressing areas for development arising from Independent Governance Reviews (IGRs), creating a clear link between the two initiatives. However, the Secretariat has been clear that IGRs are not intended to be the sole route into peer support. While supporting funds in responding to governance review findings is likely to be an important use of the programme, peer support is intended to be a broader sector-led improvement offer that can assist funds at any stage of their governance and service improvement journey. As experience of the programme develops, IGRs may become a significant driver of demand, but they are expected to be only one of several routes through which funds may access peer support.

However, the practical relationship between IGRs, peer support and other support funds may seek is still emerging which must be considered. The pressure to meet the statutory deadline for funds to undertake an IGR by March 2028 does however

mean that many funds are understandably prioritising planning for and delivery of that review in preference to volunteering for peer support. As a result, while both initiatives are developing concurrently there is uncertainty over the common themes likely to emerge from IGRs and the extent to which funds may seek peer support in response to their review findings.

This presents both an opportunity and a risk for the programme. While IGR outcomes may ultimately help to demonstrate the value of peer support and generate demand for the offer, there is also a risk that uncertainty around review outcomes and competing fund priorities may affect engagement during the early stages of programme development. The secretariat therefore considers it important to continue to focus on successfully testing and evaluating the peer support model through the pilot phase before making decisions about wider rollout, scale or long-term funding arrangements.

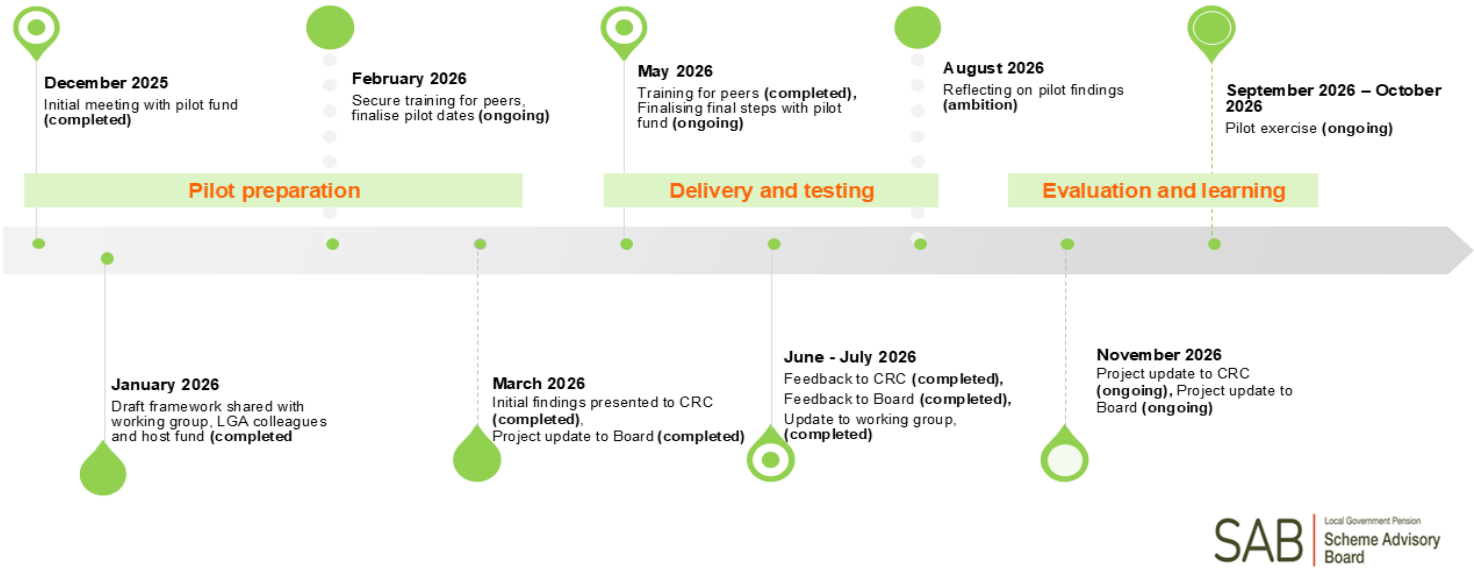
Learning from both the pilot programme and the first wave of IGRs will provide a stronger evidence base for determining how peer support can best complement IGRs and support funds in responding to any recommendations arising from their reviews.

Pilot project update

The overall project milestones were agreed in February 2025 and have evolved as the pilot deliverables have been identified. See **Annex A** for an updated plan of the key milestones within delivery of pilot 1. These are based on our understanding of the project and learning from LGA colleagues on similar projects.

Annex A

Key milestones of the delivery of pilot 1



SAB Local Government Pension Scheme Advisory Board