

CITY OF
WOLVERHAMPTON
COUNCIL

Pensions Committee Meeting

Wednesday, 21 September 2022

Dear Councillor

PENSIONS COMMITTEE - WEDNESDAY, 21ST SEPTEMBER, 2022

I am now able to enclose, for consideration at next Wednesday, 21st September, 2022 meeting of the Pensions Committee, the following reports that were unavailable when the agenda was printed.

Agenda No	Item
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5	<u>Customer Engagement (Pages 3 - 26)</u>
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[To receive an update of the Fund's customer engagement activity – Appendix B.]

If you have any queries about this meeting, please contact the democratic support team:

Contact Fabrica Hastings

Tel 01902 552699

Email Fabrica.Hastings2@wolverhampton.gov.uk

Address Democratic Support, Civic Centre, 1st floor, St Peter's Square,
Wolverhampton WV1 1RL

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CITY OF WOLVERHAMPTON COUNCIL	Pensions Committee 21 September 2022
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Report Title	Customer Engagement Update	
Originating service	Pension Services	
Accountable employee(s)	Simon Taylor Tel Email	Assistant Director (Pensions) 01902 554276 Simon.taylor2@wolverhampton.gov.uk
Report to be/has been considered by	Rachel Brothwood Tel Email	Executive Director of Pensions 01902 551715 Rachel.brothwood@wolverhampton.gov.uk

Recommendations for action or decision:

The Pensions Committee is asked to approve:

1. The Customer Engagement Strategy and Communications Policy as set out in Appendices B and C.

Recommendations for noting:

The Pensions Committee is asked to note:

2. The re-accreditation of the Fund for Customer Service Excellence for 2022.

1.0 Purpose

- 1.1 To provide Committee with an update of the Fund's customer engagement activity from 1st April 2022 to 30th June 2022 and to cover future planned customer engagement activity in the context of the Fund's Customer Engagement Strategy.

2.0 Background

- 2.1 One of the Fund's key objectives is to engage to improve outcomes for our customers. In line with this objective, the Fund has published, and keeps under review, a Customer Engagement Strategy, to review satisfaction and help inform improvements to its pension services.

3.0 Member Engagement & Communication

- 3.1 During the summer, a Customer Service Excellence (CSE) assessor visited the Fund to review customer service and engagement over the last 12 months and consider the Fund's re-accreditation of CSE. The Fund has successfully passed the accreditation with a number of developing engagement activities receiving positive recognition and achieving compliance plus rating for certain areas of activity.
- 3.2 The Member Services team continues to deliver member support via hybrid channels including member webinars, face to face presentation and followed up with individual consultations as required. During this reporting period **1,470** members attended our presentations, webinars and workshops (**10%** increase compared to the previous reporting period). These were followed by **173** individual member consultations. Our events are delivered at various times throughout the day to accommodate attendance around member and work commitments. This delivery and the associated feedback is summarised in Appendix A.
- 3.3 During this reporting period the Member Services team engagement encompassed district Police offices, Local Education Authority (LEA) schools and green park areas, and provided **15** satellite support events to **235** hard to reach members. These are members who may not normally be able to access our services due to the nature of their work and location, which might include access to web-based delivery (i.e., computer facilities), working hours or 'satellite' locations.
- 3.4 Through the "Be Pension Smart & Take Control of your benefits" campaign the Fund continues to encourage members to view and manage their pension record online using the pensions portal. During this reporting period registrations increased by **2,726** bringing the total pension portal registrations to **121,676** at the end of June 2022.
- 3.5 The Fund continues to promote aspects of our work via the social media platform LinkedIn. Since the last reporting period a further **2,286** people have interacted with our variety of articles from sharing shortlisting for award success to advertising our Pension Roadshow events.

- 3.6 The West Midland Pension Fund roadshow bus is now back out for face-to-face delivery, the focus from April to June was providing Roadshow support to the educational sector, such as schools, academies, colleges and universities. **6** roadshow events were delivered which provided **137** members with face to face pension support on the bus. Feedback from these events was **68%** rated the events as excellent and **32%** rated them as very good.
- 3.7 During this reporting period the Fund's member video suite (providing on-demand support and guidance to members) has been updated to include guidance so members can understand their 2022 Deferred and Active Benefit Statements.
- 3.8 "Planning your retirement" workshops are still proving to be popular with members who are over the age of 55. In this quarter the Member Service team delivered **9** workshops to active members which helped **206** members with their retirement planning. Due to the success and demand of these workshops we have adapted the support to suit our deferred members, we delivered our first one in July 2022.
- 3.9 The Fund continues to target active and deferred members who do not hold a valid Nomination Form through our Nomination Form campaign, the focus over this period was contacting members who work in the education sector.
- 3.10 Following the Fund's office move from April 2022, we have completed extensive engagement to communicate our new location and how accessible we now are to local transport links with our members. Our communication channels included bulk emails which were sent to all three membership categories, an article in our Pensioner newsletter, a reminder on our Active & Deferred Benefit Statements and information on the Fund's website.
- 3.11 Progress has been underway to produce as many Deferred Benefits Statements as possible. This year the Fund has produced **99,385** statements, and this was followed up with **55,000** emails and **17,000** text messages to members where we hold a valid email address and mobile number to notify members that their statement was available on the portal.
- 3.12 Prior to the pandemic the Fund hosted a pilot "Tea & Teach" session at Wolverhampton Art Gallery with the objective to bring pensioners together face to face over refreshments and give them the chance to sit down with a Fund officer to talk about any pensions-related issues they may have. Due to the success of this pilot event and with the easement of Covid restrictions, during this reporting period we delivered **7** "Tea & Teach" events across the whole of the West Midlands, which **286** pensioners attended. These events were supported by selected partners including:
- Pensions Age
 - Independent Age
 - Local transport providers
 - Dementia Friends

Feedback from these events were **83%** of attendees rated the event as excellent, **16%** rated us as good and **1%** as satisfactory.

- 3.13 In May 2022 the Fund undertook a verification exercise of its overseas deferred scheme members to ensure accurate and up to date details are held on our systems. This is done through letter from our 3rd party provider “Target”, however we sent **495** emails in advance to let members know that the letter was coming to ensure they engage and complete our correspondence, out of **495** emails were sent, **83%** of members read the communication.
- 3.14 In April 2022, in-line with the Customer Engagement Plan we delivered **10** deferred Local Government Pension Scheme (LGPS) webinars to **324** attendees to ensure that our services are accessible to members who have previously left the scheme, and these members have the opportunity for support and guidance with planning their retirement.
- 3.15 To increase pension education across our newer members, we piloted reaching out via bulk email to members who have recently joined the pension scheme to try and enhance their education and knowledge of the LGPS and to encourage them to engage early with their benefits. We did this by offering them the chance to attend an Induction webinar. We have delivered our first **2** webinars in May to **128** attendees. Due to the success of this piece of engagement, plans will be made to repeat this process on a quarterly basis to ensure all future new joiners of the scheme receive an email to give them the opportunity to attend an Induction webinar.
- 3.16 Member information leaflets and videos have been updated and are now being uploaded to the Fund’s website. There have been **368,000** web page views in this quarter.
- 3.17 Customer feedback is key to understanding our customer’s journey, highlighting our strengths and any gaps in the service we deliver so that we can continually improve the services we offer. We are currently reviewing the way we issue ‘Post Event’ surveys to scheme members and developing a customer feedback dashboard. Post-event surveys are on hold while this work is completed, and the new look surveys are scheduled to restart in September. Taking into consideration the other surveys that have been issued during this quarter, the performance against our KPI is **99%**.

4.0 Employer Engagement

4.1 Employer Peer Group

4.1.1 The first session of the Funds Employer Peer Group cycle for 2022/23 took place in June. Once again, a number of organisations who had not previously attended, showed interest in joining this year’s cycle, with 14 out of the 18 registered employer representatives present at the first meeting. The content for the meeting included:

- Transition of Pensions Administration System – overview and first thoughts from employers.
- The Future of Member Support – how can this be improved in the hybrid world.

- Employer Support with the bulk updating of active member email addresses.
- 2022 Actuarial Valuation – provisional schedule review and employer feedback.

4.1.2 We also received a suggestion from an employer attendee for a new standing item focusing on 'Best Practice' discussions to be driven by the employers. At this first meeting discussions took place about how to tackle outstanding leaver submissions and workload planning.

4.1.3 The first session was held virtually however the intention is for future sessions to be held in a hybrid format with attendees being given the option attend in person or via a virtual link.

4.2 Employer Webinars

4.2.1 The Employer Services team has continued to deliver a programme of employer education over the quarter with a further 5 virtual sessions delivered to 50 attendees representing 35 organisations. The sessions are free to attend and provide a useful refresher for existing employer pension and payroll teams or as an introduction to processes for those who are new to Fund administration.

4.2.2 Sessions delivered over the quarter are set out below and will continue to be rolled out over the course of the year. An increased suite of webinars is now available each month and employers are able to easily sign-up for via the Fund's website for guidance on.

- Employer Discretions
- Early Leaver Submissions on Employer Hub
- Monthly Data Collection
- Pay and Service
- Final Statement Completion – NEW For 2022
- The Pensions Administration Strategy: Your Role and Responsibilities – NEW For 2022

4.3 Employer Performance

4.3.1 Utilising the virtual working arrangements currently in place, the Employer Services team have continued to hold performance meetings with various employers throughout the period. Employer performance is assessed in line with the Fund's Pension Administration Strategy (PAS).

4.3.2 During the period the Fund held 18 feedback and performance meetings with a number of both our major and smaller employers and also with third-party payroll providers. Collectively these employers and payroll service providers are responsible for submitting the data to the Fund for over 100 organisations servicing over almost 40,000 members.

4.3.3 The work and engagement that has taken place with these employers towards the increased availability of Annual Benefit Statements (ABS) for members. As final positions become available following the 2022 ABS run the Employer Services team will begin

reaching out to request performance meetings with those seeing lower than average production rates.

4.4 McCloud: Employer Support

4.4.1 Engagement continues to be undertaken with those employers who have yet to submit the data required to comply with the expected McCloud legislation changes. The Employer Services team continues to offer support including 1:1 meetings where appropriate, helping with data collation and submission.

4.4.2 Analysis has been undertaken regarding those employers who have consistently remained unresponsive to the Fund's offers of support and who are currently deemed non-compliant with the Fund's requirements for McCloud. A letter will be issued to approximately 90 organisations aligned to the Fund's Escalation Policy, clearly setting out the implications of non-compliance, with particular reference to the potential impact on member benefits.

5.0 Other Communication and Events

5.1 In July 2022 the Member & Employer Services teams provided a bespoke webinar to the WM Bursars' Group providing an update of the LGPS and topical issues across the pensions industry and employers. **52** attendees joined our webinar and initial feedback was very positive.

5.2 On the 12 July the Fund held its first face to face Mid-Year Review event and the first large event at the Fund's new premises at i9. The event covered a variety of topics including a choice of two workshops to enable more targeted engagement on developing employer relationships and the changing economic and investment landscape.

We welcomed over **60** attendees from employers, Pensions Board and Pensions Committee, attendees rated the event as **63%** excellent and **37%** as good.

6.0 Future Engagement

6.1 As part of the Fund's hard to reach campaign to target members who may not normally be able to access our services due to the nature of their work and location, from July to September 2022 the Member Services team will be focusing on engaging with members who work in leisure centres and LEA schools.

6.2 Following changes to regulations (known as "stronger nudge") in relation to members who are, or who have previously paid Additional Voluntary Contributions (AVCs), in August 2022 the Fund wrote to **2,703** members to disclose these changes and explain the guidance that they will be required to take advice from Pension Wise in regard to the options available to them when claiming their AVC.

6.3 Progress is currently underway to organise Pension Roadshow events across the West Midlands' seven districts to provide members with face-to-face support with their benefits in the months of September & October. This will be the first set of district roadshows that the team has delivered since the pandemic. Further details and statistics will be provided in the next report.

6.4 Engagement is currently being planned to raise awareness about Pension Awareness week which is 12th September – 16th September. Members will be sent bulk emails advertising a host of events from webinars, workshops, our Roadshow events and notifying members that their Annual Statement is online.

7.0 Customer Engagement Strategy

7.1 Outside of bespoke issues or new developments, the Fund's ongoing customer engagement is largely structured around the Customer Engagement Strategy and associated Customer Engagement Plan. The Customer Engagement Strategy has been reviewed, primarily to focus upon changes which need to be made having emerged from the Covid-19 pandemic, such as the restrictions placed on face-to-face delivery, and to harness the potential afforded by our new premises through hybrid engagement and extended outreach. The updated version is provided in Appendix B for approval.

7.2 As confirmed, and appended to the June 2022 report, the Fund reviewed and updated the Customer Engagement Plan to factor in these changes in terms of more immediate delivery.

8.0 Communication Policy

8.1 Aligned to the Customer Engagement Strategy and in line with the statutory obligations set out in the LGPS Regulations, the Fund has reviewed its Communication Policy, which is referenced in the Fund's Annual Report. As might be expected, this most recent review captures changes made in the Fund's communications aligned to the changes made to the Customer Engagement Strategy. This policy will remain subject to a process of continued review against the Fund's objectives and deliverables set out in the Customer Engagement Strategy. Committee is asked to approve the revised policy, as detailed in Appendix C.

9.0 Financial Implications

9.1 There are no financial implications associated with this report.

10.0 Legal Implications

10.1 There are no legal implications associated with this report.

11.0 Equalities Implications

11.1 The report contains no direct equalities implications.

12.0 All Other Implications

12.1 This report contains no other potential implications.

13.0 Schedule of Background Papers

13.1 There are no background papers.

14.0 Schedule of Appendices

14.1 Appendix A - Review of feedback from member presentations and individual pension consultations

14.2 Appendix B – Customer Engagement Strategy

14.3 Appendix C – Communications Policy



CUSTOMER ENGAGEMENT STRATEGY 2022 SEPTEMBER 2022



West Midlands Pension Fund

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THE AIM OF THIS ENGAGEMENT STRATEGY

Raising Awareness and Aiding Understanding

The *Customer Engagement Strategy* sets out how we will engage, consult and involve our customers as we seek to put our customers at the heart of everything we do. In line with the Fund’s objectives, the Customer Engagement Strategy plays a key role in ensuring the Fund drives continuous improvement and develops working practices, systems and processes which are informed and prioritised according to the needs of our customers.

The strategy aims to inform our customers of the opportunities for them to engage and contribute towards the way we develop and deliver our services whilst emphasising that engagement sessions are not just about delivering information, but about enabling members and employers to work with the Fund to shape our services to be fit for the future.

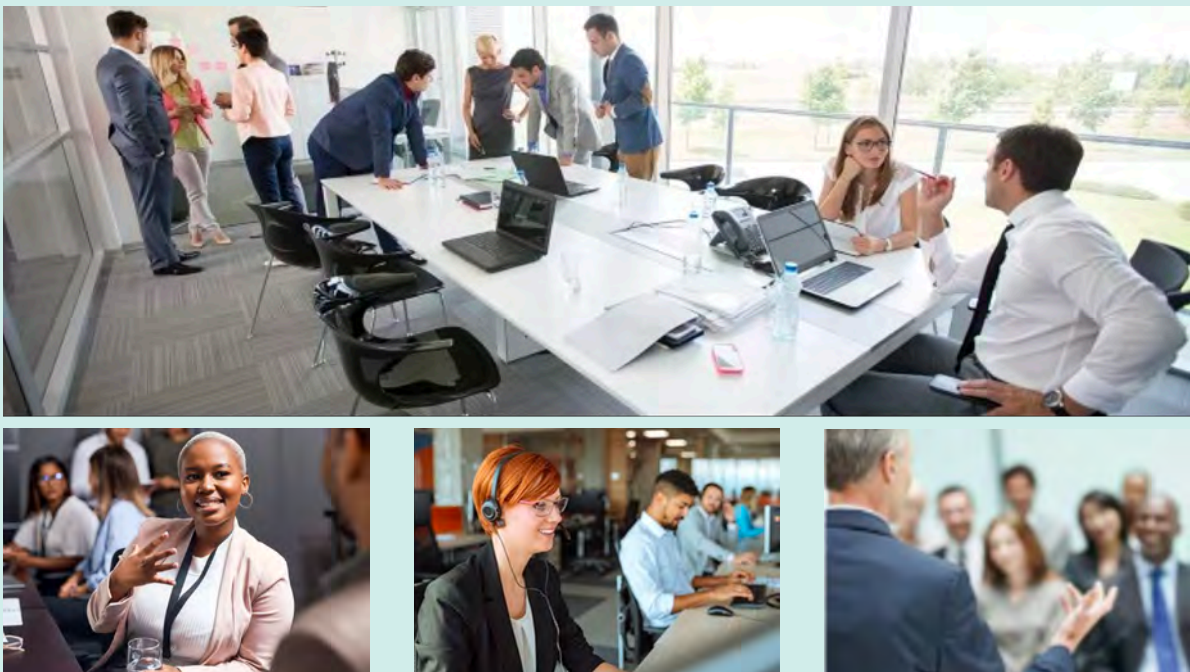
We measure effectiveness through frequent surveys, feedback and internal reports to ensure we’re improving customer satisfaction, engagement and relationships, and creating efficiencies within ongoing development and digital transformation.



MEET THE FUND

West Midlands Pension Fund (the Fund) is one of the UK’s largest pension funds, managing and administering the pension interests of over 330,000 members and around 800 scheme employers.

As a public service pension scheme, the Fund’s main focus is on providing a high quality service to its members to enable their planning for a comfortable retirement and our ability to assist them depends on our ability to manage and deliver a service that is responsive to their needs.



Our Awards and Accreditations

INVESTORS IN PEOPLE® We invest in people Gold

Investors in People (IIP) - Gold Award

The Investors in People accreditation is much more than a business assessment. Investors in People aids in embedding excellence in an organisation and recognising the value and achievement of its people. Achieving 'Gold' status recognises our organisational excellence and is testament to the fact that everyone is fully engaged in our vision.

CUSTOMER SERVICE EXCELLENCE®



Customer Service Excellence

The Government wants public services for all that are efficient, effective, excellent, equitable and empowering – with the citizen always and everywhere at the heart of public service provision. With this in mind, Customer Service Excellence was developed to offer public services a practical tool for driving customer-focused change within their organisation. The West Midlands Pension Fund have been holders of this accreditation continually since 2008.



Enei

We are committed to building a workforce that is reflective of the diverse community we serve. As employees of the City of Wolverhampton Council, we strongly believe in adding value through diversity, inclusion, and equality. We encourage, inspire and value an inclusive culture where employees can flourish, thrive and be themselves. The Fund supports the equality forums held at the City of Wolverhampton Council to ensure our workforce has a voice, employees feel empowered to speak up and everyone is treated with respect and overall be a great place to work.



The Pensions Administration Standards Association (PASA)

The PASA, the independent body dedicated to driving up standards in pensions administration, today announced West Midlands Pension Fund has been awarded PASA Accreditation – the 'gold standard' for high quality pensions administration.

CORE VALUES

Our core values guide how we work and engage with each other, our customers and industry – it's what make us different and stand out from the crowd.

THE FUND'S CORE VALUES

- P** **PARTNERING** FOR SUCCESS
- R** **RESPONSIBLE** ASSET OWNER, EMPLOYER AND LOCAL COMMUNITY PARTNER
- I** **INVESTING** TO INCREASE CAPACITY
- D** **DELIVERING** VALUE ADDED SERVICES
- E** **ENGAGE** TO IMPROVE OUTCOMES FOR CUSTOMERS

OUR VALUES AND BEHAVIOURS

This demonstrates our wider commitment to customer focus and being alive to evolving needs and set against the Fund's ambitions towards our customers and people as set out in the Corporate Plan.

Place our customers first	Ensure ownership, responsibility and accountability	Have trust, mutual respect and professional integrity
Build long-term working relationships to deliver team and Fund objectives, raise the profile of the Fund	Learn from our experiences and share knowledge to get things right first time	Value our colleagues

ENSURING THE ONGOING DEVELOPMENT OF OUR SERVICES

Ultimately, engaging with our customers helps the Fund to understand customer feedback, review and monitor service effectiveness, analyse performance, and develop and deliver a service that is focused on the requirements of our customers.



By taking the time to engage with our customers about the services we deliver, we aim to fully understand the use of our services and our customers' expectations in order to keep up to date with customer experience and changing needs. The Fund regularly reviews our performance to help maintain, build and develop partnerships with our stakeholders, utilising opportunities for service improvements and efficiency.

Effective customer engagement ensures the Fund is able to support our customers through significant events, equipping them with the knowledge to make decisions.

Our success is dependent on building and maintaining good working relationships with our employers and scheme members, and this strategy aims to ensure customer focus is embedded in Fund operations and exhibited in our behaviours.


OUR CUSTOMERS AND STAKEHOLDERS

The Fund aims to have an inclusive and consistent approach to its customer engagement, we seek opportunities to reach out to representatives across the employer and member base to ensure a valued service is delivered.




Members

The Fund has over 330,000 members and recognises that good customer engagement ensures we provide clear and concise information at the times when it's most important to assist our members in making the right decisions to help to secure their future pension benefits.



Employers

The Fund has more than 800 employers including local authorities, the education sector (higher education, further education and academies), housing associations, private and voluntary sector organisations. In recognising the range of employers we have, the Fund tailors its engagement to ensure it delivers for differing employer needs.



Partner organisations and trade unions

Being one of 86 Local Government Pension Scheme funds in England and Wales, we recognise the value in engagement with our partner organisations, be it other LGPS funds or the wider industry. The Fund has representatives from our trade unions sitting on Pensions Committee where they are invited to engage and debate issues relevant to our members. Five trade union representatives currently sit as member representatives on the Fund's Local Pensions Board.



Governing Bodies and the Representation Policy

These documents confirm how we will engage a broad range of representatives and stakeholders:



Governance Compliance Policy

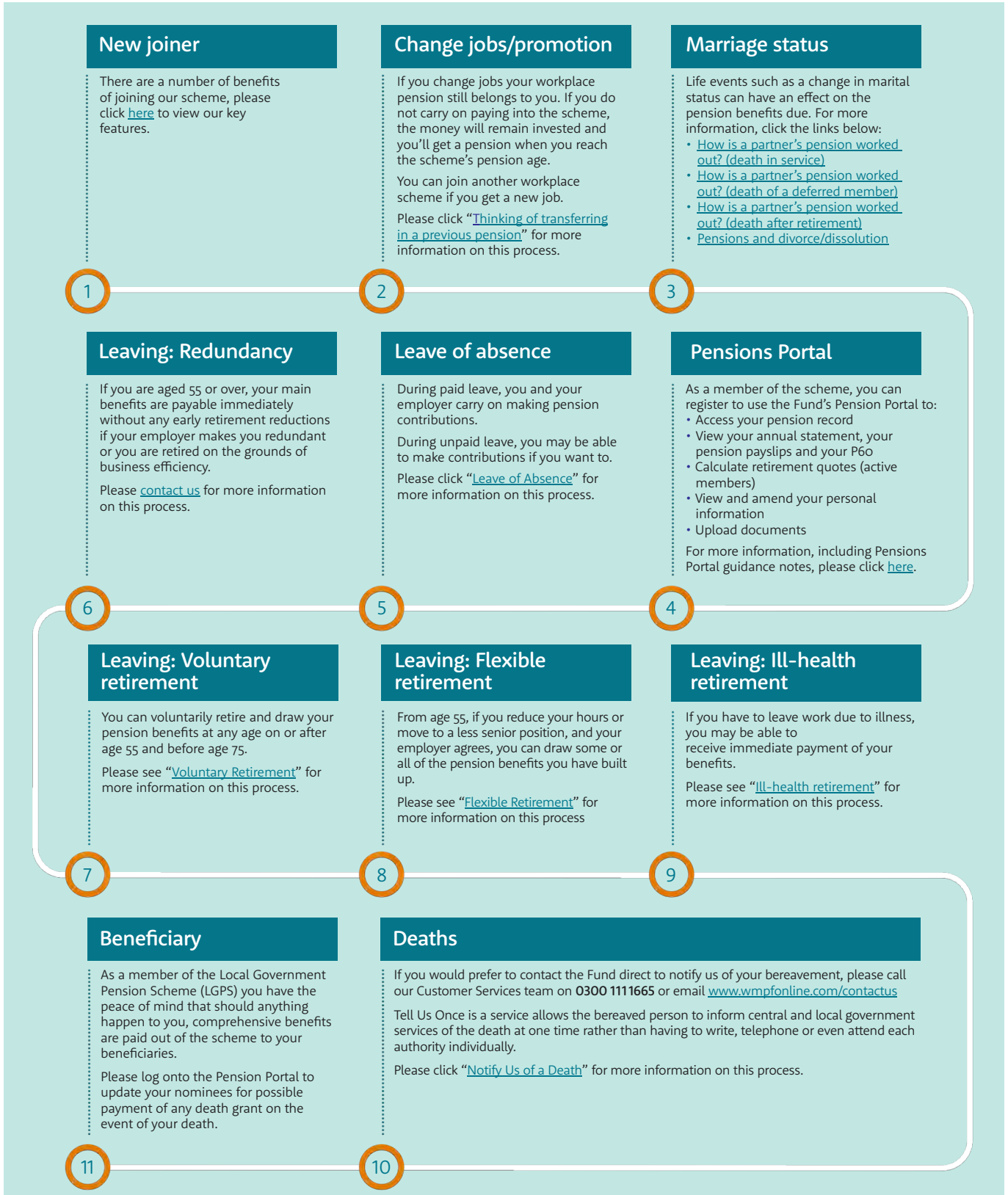


Representation Policy

THE PENSION JOURNEYS

Members' Pension Journey

The Fund manages over 330,000 membership records (including active, deferred, pensioner and beneficiary). The Fund recognises that the journey of our customers can span a significant portion of their lifetime and vary between generations, as life events such as changing jobs or changing working hours, impact on pension benefits and options.



Keeping up to date
on your journey

Pensions Portal: Use the Pensions Portal to access to your Fund account information.

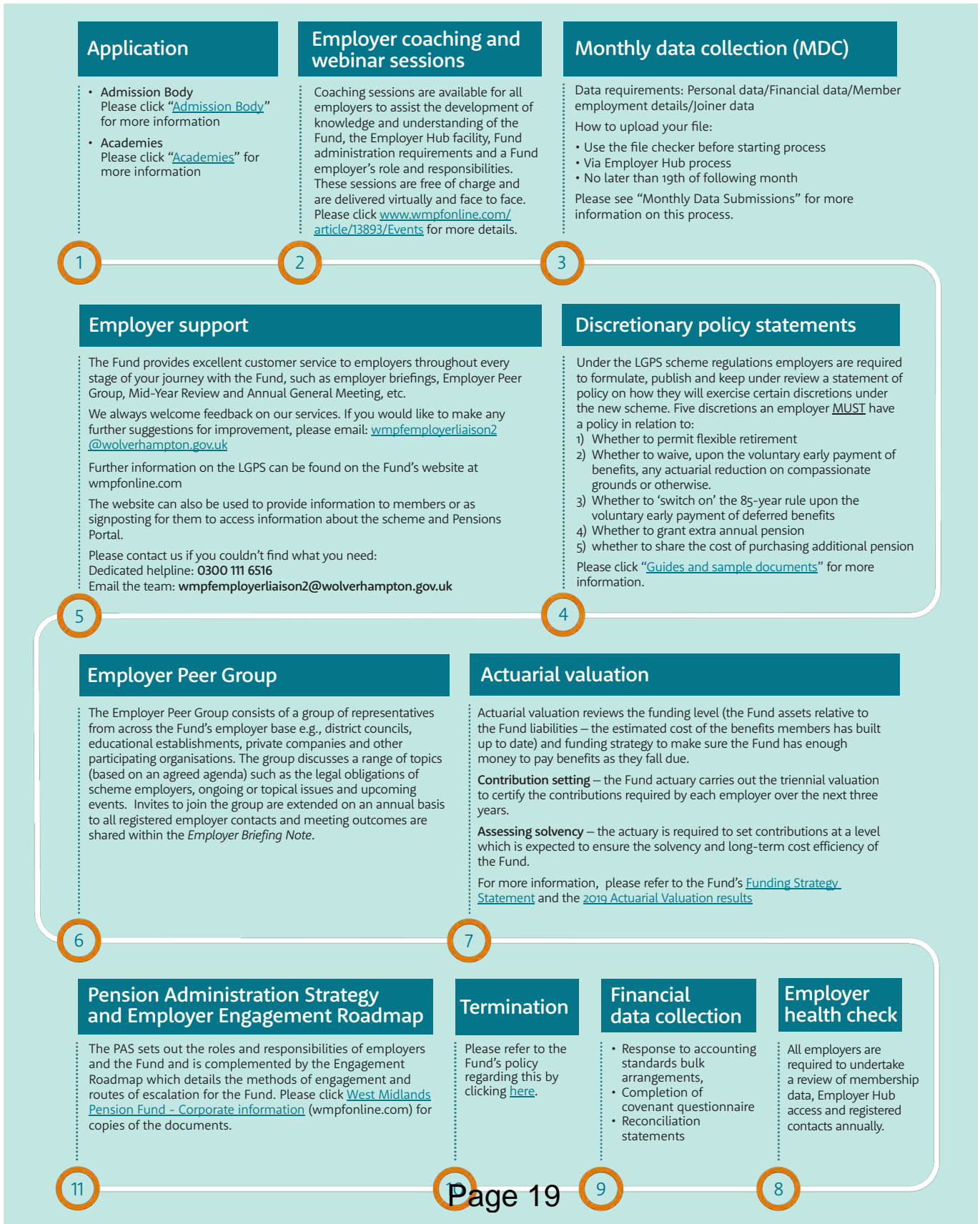
Newsletter: Annual newsletters from the Fund providing you with essential information about your pension benefits.

Benefit statements: Benefit statements are uploaded to the Pensions Portal, [check your Pensions Portal account](#) today! Please [contact the Fund](#) if you couldn't find what you need.

Employers' Pension Journey

The Fund has more than 800 employers varying from local authorities and academies to charities and contracting bodies.

Our engagement strategy ensures the delivery and improvement of our services for all our employers whether they are just starting their journey with the Fund or going through a transition.



OUR ENGAGEMENT SERVICES

The Fund's aim is to ensure relevant information is available to its members in a timely manner and presented clearly. To ensure effective engagement, activities are developed in consideration of the knowledge, range of personal circumstances and contact method preferences.



The West Midlands Pension Fund has dedicated Customer Services team and Member Services team; both are specialist support functions of pension officers who have extensive knowledge and expertise of the Local Government Pension Scheme and are committed to supporting members by providing information on a wide range of pension matters.

Contact via My Pension Portal

Call the Fund's Dedicated Customer Services Team on 0300 111 1665

All letters should be sent to:
West Midlands Pension Fund
PO Box 3948
Wolverhampton
WV1 1XP

Use our secure email form at wmpfonline.com/emailus

Visit www.wmpfonline.com

Our website is kept up to date with the latest scheme and Fund information.

Members can access information in different formats, including booklets and videos as well as page text. If you require a copy of any information in a different format, we will be more than happy to facilitate this. Please contact us with your request at wmpfonline.com/contactus

Visit us

Members can visit our offices at:
ig, Wolverhampton Interchange
Railway Drive
Wolverhampton
WV1 1LD

Pre-Retirement



- Roadshow Events

- Presentations
- Bespoke Employer Events
- Drop-in Sessions
- Member Newsletters



- Statutory Disclosures
- Deferred Members
- Workshops



Retirement



- Pensioner Workshops
- Pensioner Mailings and Newsletters
- For Overseas Members




The Fund has a dedicated Employer Services team who are on hand to assist with enquires about Fund and employer responsibilities. The team offers support to a variety of employer types and can be contacted on the following email address: wmpfemployerliaison2@wolverhampton.gov.uk

Alternatively, you can call the Fund’s dedicated employer helpline on 0300 111 6516.




- Employer Coaching and Webinar Sessions
- Employer Briefing Note
- Employer Peer Group
- Employer Events (Mid-Year Review and Annual General Meeting)
- Employer Survey
- Employer Annual Health Check






Self-service helps members access secure self-service platforms and interact with organisations on a real-time basis. Members can follow the link to 'My Pensions Portal' to access their pension record.

In addition, the Fund continues to work with employers developing our services and online forms through the employer portal providing them an opportunity to self-serve also.



- Pensions Portal
- Employer Portal
- Employer Hub




The Fund has dedicated support for governing bodies and specialist support functions to ensure Fund data, systems and reporting is in place to support our customers.



- Pension Committee and Pensions Board Members

Our Customer Engagement Plan is appended to this document highlighting the various events and locations where our customers can engage with the Fund. Click [Customer Engagement Plan](#) for more information.

CUSTOMER SAFEGUARDING

In the UK, the NHS defines safeguarding as 'protecting people's' health, wellbeing and human rights, and enabling them to live free from harm, abuse and neglect'.

It is our responsibility to appropriately safeguard individuals, and it is a fundamental part of how we engage to improve outcomes for customers.

Where there is a safeguarding concern, we will engage with the customer and work closely with the relevant authorities to investigate and resolve issues raised.

For this process to be effective, we need to ensure that staff are suitably trained to be able to identify safeguarding concerns and to know how to deal with them should they arise. Staff receive regular safeguarding training, and we have appointed a Designated Safeguarding Lead, in addition to an Internal Safeguarding Board.

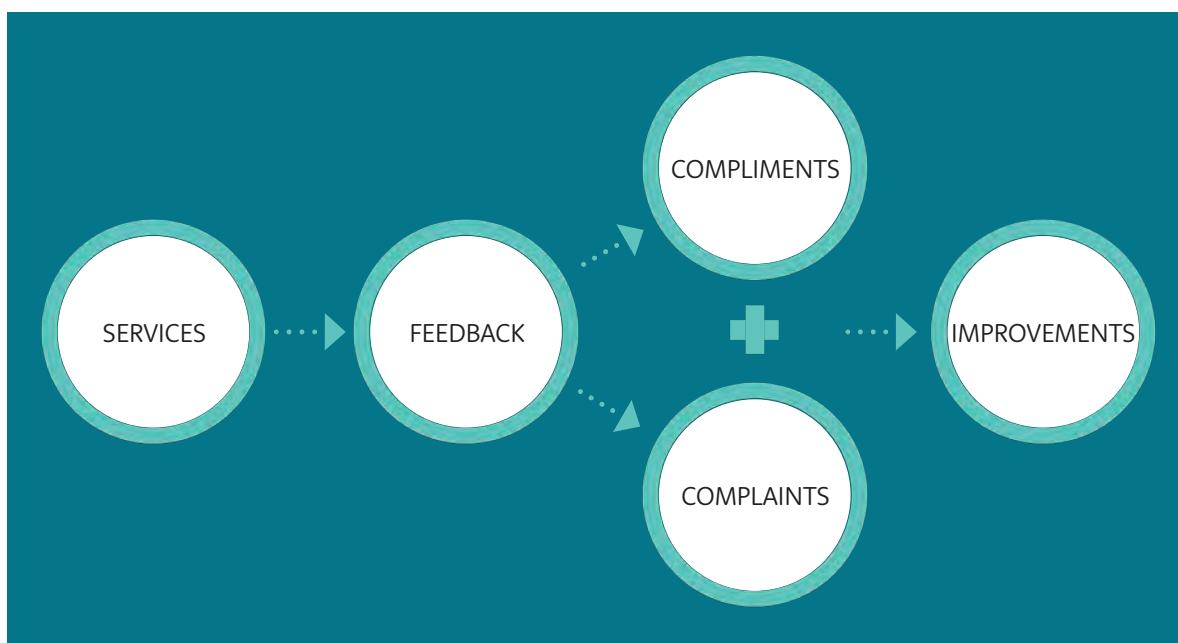
We are committed to maintaining confidentiality at all times, and expect all staff to comply with data protection law. Information will not be shared unless it is required, and, in these instances, it will be shared with the relevant authorities in the right way and at the right time to ensure that any potential risk is reduced or avoided.

SERVICE DELIVERY REVIEW

The Fund aims to deal with our customers fairly, promptly and to give them the best possible service in accordance with our standards and timescales. The Fund monitors the quality of our service and reports on how well we have lived up to the expectations of our customers.

To achieve our aim, we seek the reviews of our customers to help inform us on how well we are performing and any improvements we could make. We also aim to encourage feedback and comments regarding different communication channels in order to identify improvements and changes.

If you have any questions or requests that are personal to your account, you can use online, secure messaging to ask us a question within the Pensions Portal or you can call us on **0300 111 1665**.



Compliments

Receiving praise for providing good customer service helps teams and individuals to improve and share areas of best practice. Your compliment will be sent to the line manager and the colleague(s) concerned, and we then share these within the organisation using our compliments register.

Feedback/Suggestions

Customer feedback is key to understanding our customer's journey, highlighting our strengths and any gaps in the service we deliver so that we can continually improve the services we offer. To help us understand our customer's journey, we have introduced a range of 'post-event' surveys that invite members to share their experiences with a range of Fund processes. Surveys are continuing to expand and include:

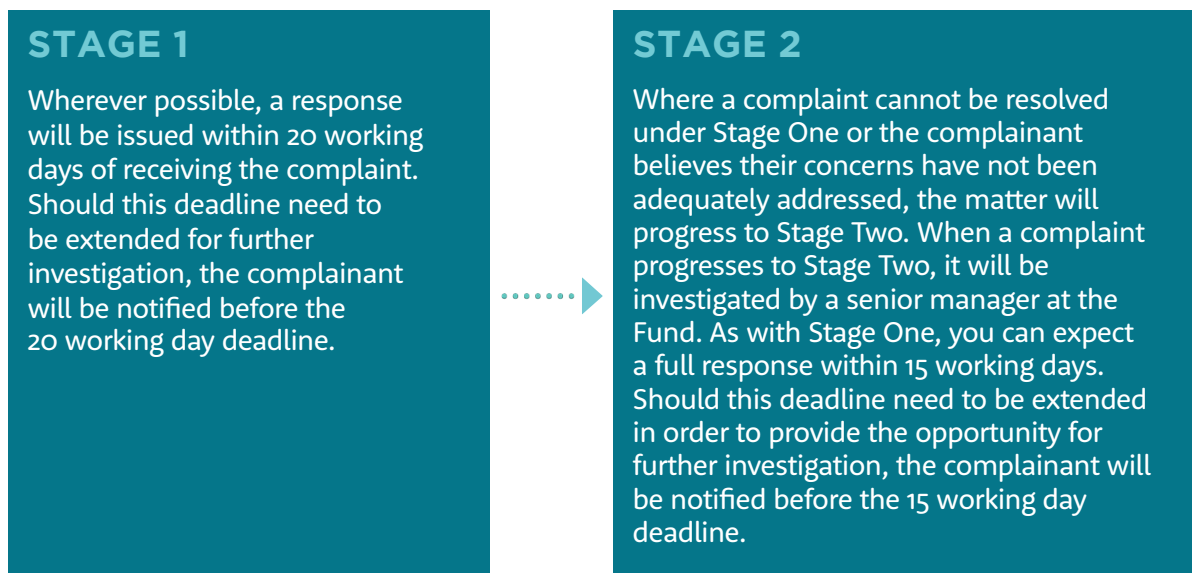
- New Joiner Surveys
- Retirement Surveys
- Transfer Surveys
- Customer Services Surveys
- Website Surveys
- Annual Employer Survey

If you would like to provide feedback on the service you have received, please visit www.wmpfonline.com/feedback

Complaints

If something has gone wrong, we want to know so that we can put it right as quickly as we can for you. Where possible, the Fund will always try to resolve your complaint at the first point of contact. There will be times where we are unable to resolve a complaint raised at the first point of contact and where this occurs, the formal complaints process will begin, and the matter will be formally logged as a complaint.

The Fund has a two-stage complaints process:



Internal Dispute Resolution Procedure (IDRP)

The Fund has a two stage IDRP process which allows for review of appeals by nominated adjudicator.

A summary of the process followed by an employer and the Fund can be found using the following links:

[Decision of an employer](#)

[Decision of the Fund](#)

The full process is detailed in the following document: [Internal Dispute Resolution Procedure](#)

Target Outcomes and Monitoring

The Customer Engagement Strategy is subject to the Fund's programme of continual review and development to ensure the activities and opportunities we present achieve our aims and objectives. To measure this success, the Fund will focus on the following outputs:

- Improving our communication and accessibility of online services.
- Maintaining and improving Fund performance for processing member benefits.
- Reduction in outstanding data queries for employers.
- Improvement in timely and accurate submission of information to the Fund and to increase provision of Annual Benefit Statement and Deferred Benefit Statement to members.

Through our engagement activities, we report back on the successes or challenges of our engagement which have led to service development and improvements, reporting on a quarterly basis to our Pensions Committee our key performance indicators (KPIs) on customer service.

MEMBERS' FEEDBACK

"All staff were friendly and welcoming. Really enjoyable event, Thank you"

Pensioner after attending a Tea & Teach session
June 2022



"Everyone I spoke to was clear and helpful and got back to me when they said they would"

Member calling helpline –
July 2022



"Staff were very patient and professional at all times"

Fund member following a face-to-face consultation
May 2022



"Excellent customer service and reassuring that it's so straightforward to contact the Fund"

Member calling helpline –
July 2022



EMPLOYERS' FEEDBACK

"Can I say I have received a number of comments from attendees who said the presentation was outstanding"

Fund employer following a LGPS & You presentation for staff



"Always welcoming and listen to what we say"

Employer event attendee –
February 2022



"Many thanks for the retirement briefing session. It was really helpful and clear (which is quite an achievement with pensions)"

Fund employer following a Pre-Retirement presentation delivered to staff



THE FUND'S FOCUS IN LINE WITH THE SERVICE PLAN

The Fund's focus is:

<p>ENHANCING MEMBER COMMUNICATION and ensuring sound financial management through investment and funding strategy.</p> 	<p>DATA IMPROVEMENT in line with The Pensions Regulator's expectations of data quality and the delivery of benefit statements.</p> 	<p>DIGITAL TRANSFORMATION including service development that assists employers processing of monthly submissions.</p> 
<p>ENGAGE WITH EMPLOYERS on the submission of data and ideas for future development.</p> 	<p>INCREASE REGISTRATIONS for Pensions Portal and encourage self-service of our members.</p> 	<p>CONTINUED ENGAGEMENT with other funds and other key stakeholders on member communication and other initiatives.</p> 
<p>WORK WITH OUR TRADE UNIONS to shape and deliver our services ensuring they deliver for our members.</p> 	<p>INVEST in our Pensions Committee and Pensions Board members to ensure they are able to meet their statutory duty on knowledge and understanding.</p> 	<p>INVEST in the Fund workforce to ensure our employees are trained and developed in their specialised area able to respond to and support our customers and employers with their queries.</p> 

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