



# 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.

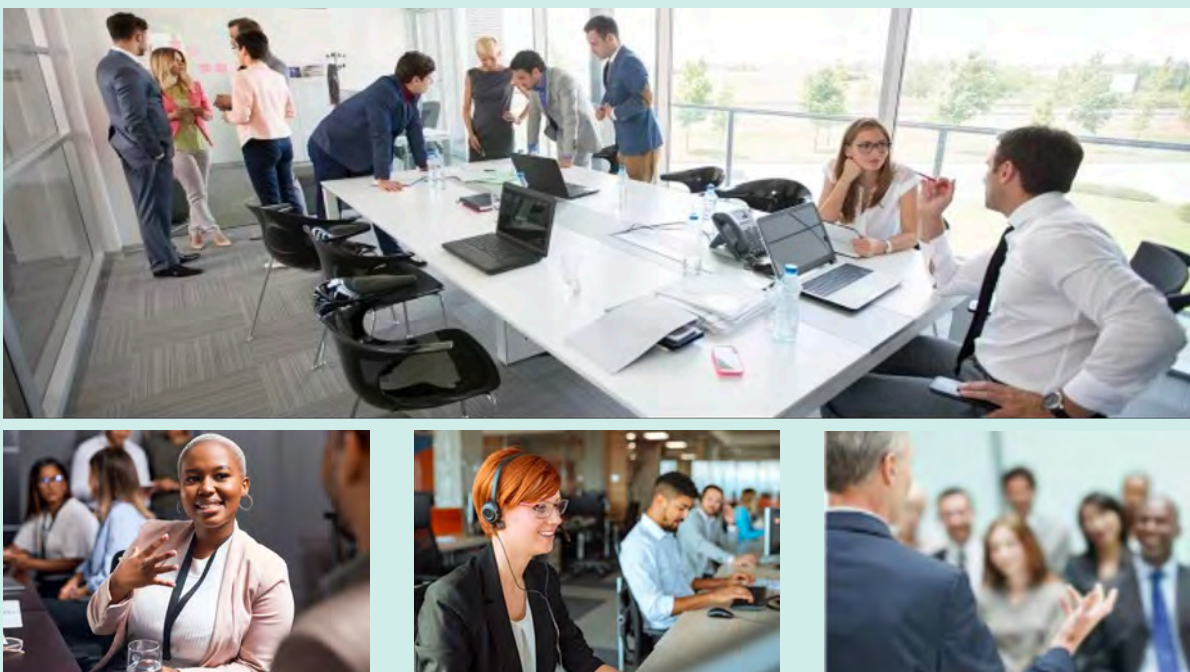
We measure effectiveness through frequent surveys, feedback and internal reports to ensure we’re improving customer satisfaction, engagement and relationships, and creating efficiencies within ongoing development and digital transformation.



## 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

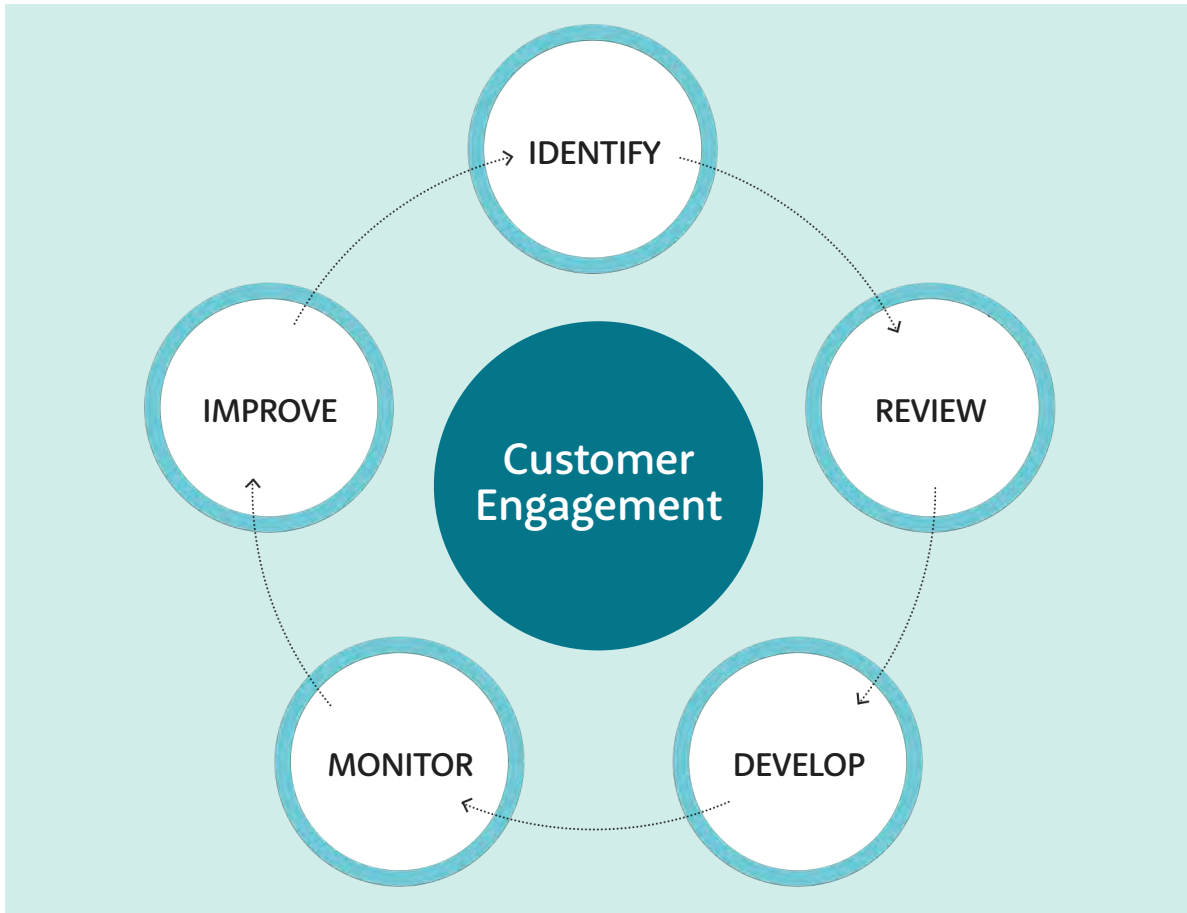
## OUR VALUES AND BEHAVIOURS

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**

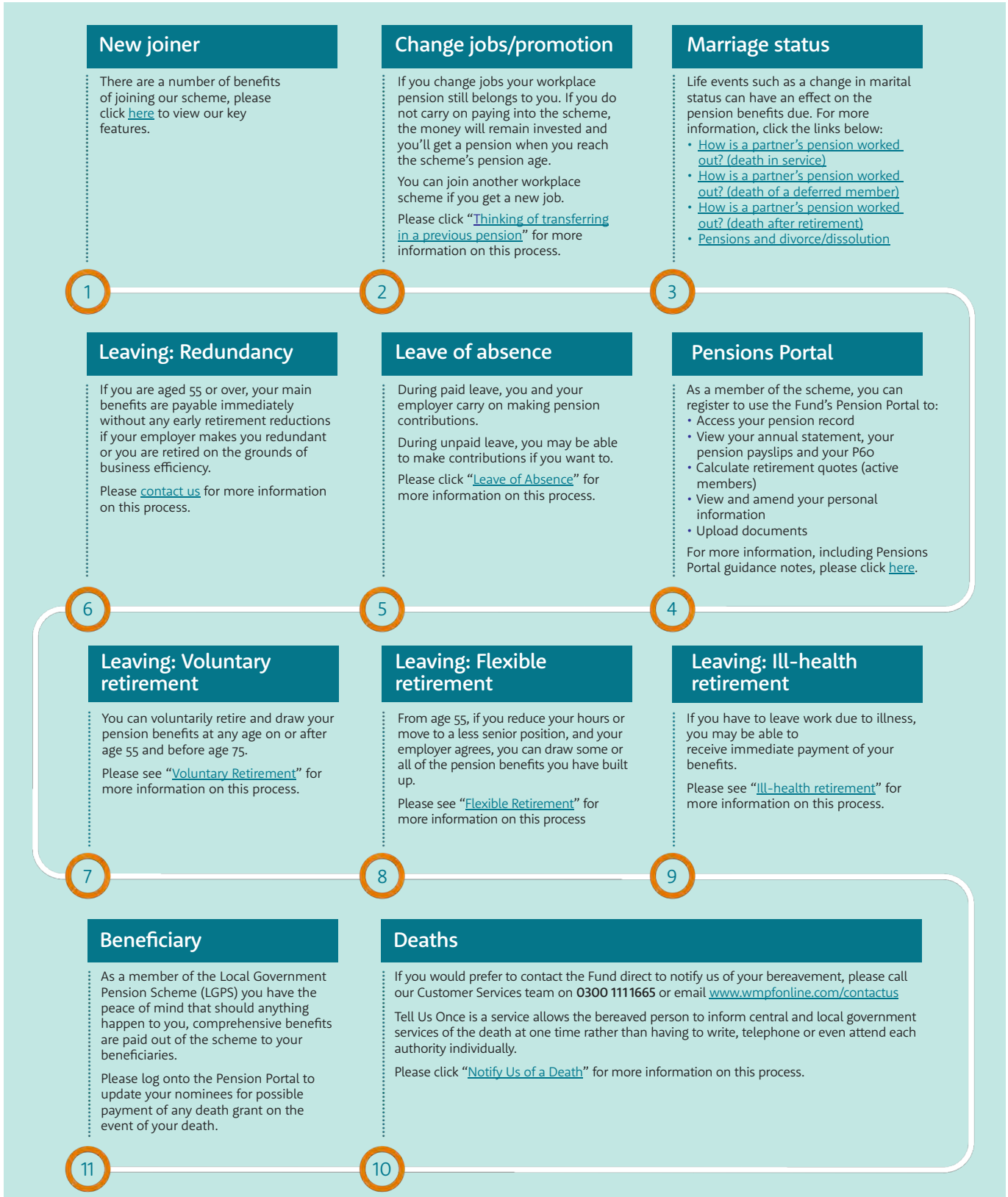


**Representation Policy**

## 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](mailto:wmpfonline.com/emailus)

### Visit [www.wmpfonline.com](http://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](http://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](mailto:wmpfemployerliaison2@wolverhampton.gov.uk)


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

- Employer Peer Group
- Employer Events (Mid-Year Review and Annual General Meeting)
- Employer Survey
- Employer Annual Health Check







- Employer Coaching and Webinar Sessions
- Employer Briefing Note



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.

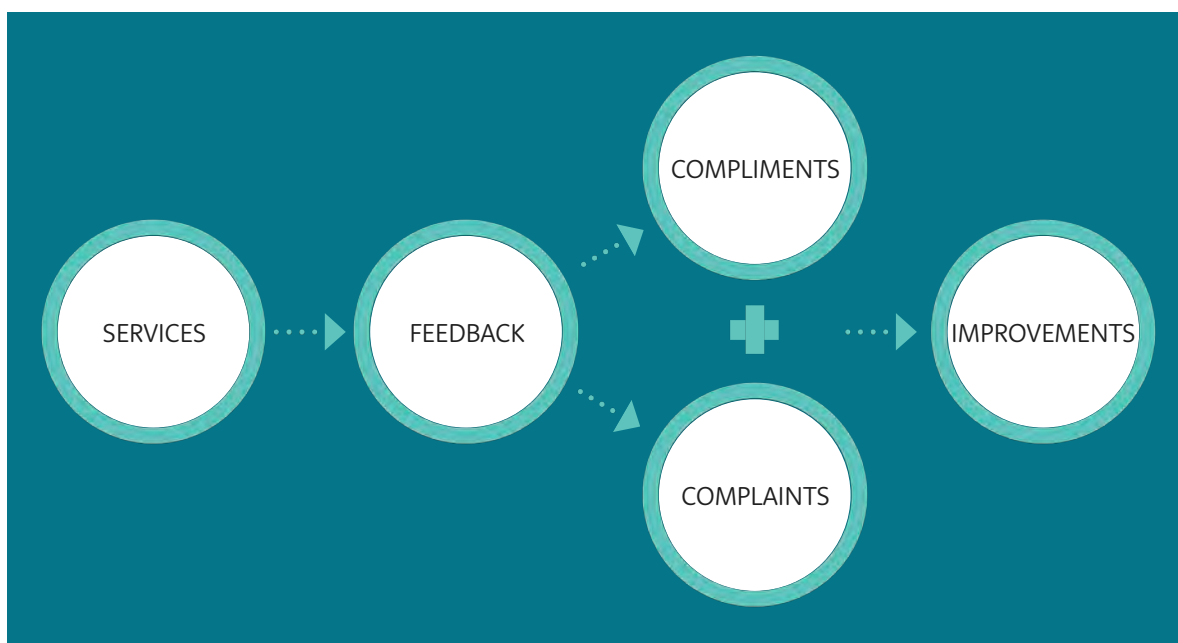
We are committed to maintaining confidentiality at all times, and expect all staff to comply with data protection law. Information will not be shared unless it is required, and, in these instances, it will be shared with the relevant authorities in the right way and at the right time to ensure that any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

#### STAGE 1

Wherever possible, a response will be issued within 20 working days of receiving the complaint. Should this deadline need to be extended for further investigation, the complainant will be notified before the 20 working day deadline.



#### STAGE 2

Where a complaint cannot be resolved under Stage One or the complainant believes their concerns have not been adequately addressed, the matter will progress to Stage Two. When a complaint progresses to Stage Two, it will be investigated by a senior manager at the Fund. As with Stage One, you can expect a full response within 15 working days. Should this deadline need to be extended in order to provide the opportunity for further investigation, the complainant will be notified before the 15 working day deadline.

**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><b>ENHANCING MEMBER COMMUNICATION</b> and ensuring sound financial management through investment and funding strategy.</p> 	<p><b>DATA IMPROVEMENT</b> in line with The Pensions Regulator's expectations of data quality and the delivery of benefit statements.</p> 	<p><b>DIGITAL TRANSFORMATION</b> including service development that assists employers processing of monthly submissions.</p> 
<p><b>ENGAGE WITH EMPLOYERS</b> on the submission of data and ideas for future development.</p> 	<p><b>INCREASE REGISTRATIONS</b> for Pensions Portal and encourage self-service of our members.</p> 	<p><b>CONTINUED ENGAGEMENT</b> with other funds and other key stakeholders on member communication and other initiatives.</p> 
<p><b>WORK WITH OUR TRADE UNIONS</b> to shape and deliver our services ensuring they deliver for our members.</p> 	<p><b>INVEST</b> in our Pensions Committee and Pensions Board members to ensure they are able to meet their statutory duty on knowledge and understanding.</p> 	<p><b>INVEST</b> 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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Next review:	September 2023