

# Pensions Board

04 July 2023

<b>Report Title</b>	Customer Engagement Update	
<b>Originating service</b>	Pension Services	
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## Recommendations for action:

The Pensions Board is asked to note:

1. The engagement activity and informed service development.
2. The outcomes of the Customer Service Excellence re-accreditation.

## 1.0 Purpose

- 1.1 To provide Board with an update of the Fund's customer engagement activity from 1 January 2023 to 31 March 2023 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 customer satisfaction and help inform improvements to its pension services.

## 3.0 Member Engagement & Communication

- 3.1 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 **968** members attended our presentations, webinars and workshops. These were followed by **358** 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 are summarised in appendix A.
- 3.2 During this reporting period the Member Services Team targeted district Police stations and Local Education Authority (LEA) schools and provided **25** satellite support events to 225 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.
- 3.3 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 **2,305** (this is 702 members more than the previous reporting period) bringing the total pension portal registrations to **129,925** at the end of March 2023.
- 3.4 The Fund continues to promote aspects of our work via the social media platform [LinkedIn](#). Since the last reporting period a further **9,653** (1,991 more hits since the last reporting period) people have interacted with our variety of articles from purposeful pension videos, member engagement events and recruitment.
- 3.5 The Fund roadshow was back out on tour across the region visiting depots, the plan to support these members spans from February to May. During this reporting period we have visited **4** locations and seen **146** members. Feedback from these events was **89%** rated excellent and **11%** rated very good. A further **3** depot roadshows have been delivered during May, assisting **115** members.

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- 3.6 “Planning your retirement” workshops are still proving to be popular with members who are over the age of 55. In this quarter the Member Services Team delivered **10** workshops to active members which helped **263** attendees with their retirement planning.
- 3.7 The Fund continues to target active and deferred members who do not hold a valid nomination form through our nomination form campaign, over this period we changed our approach by sending written letters to members instead of emails to encourage a higher response rate.
- 3.8 During March and April P60s and newsletters were issued to our pensioners. This year the Fund sent out **115,000** pensioner newsletters which contain useful information such as pension pay day dates, pensions increase information, explaining members P60s and signposting to support to help our pensioners with the cost-of-living crisis.
- 3.9 During this reporting period the Fund’s member video suite, providing on-demand support and guidance to members, has been expanded to include new videos such as helping our pensioner members understand Pensions Increase for 2023, deferred benefits statement video 2023 and re-vamping our pensions portal registration video.
- 3.10 Noting the importance of cleansing data, in February 2023 the Fund has written to **2,806** active members, **4,223** deferred members and **2,461** pensioners who we believe may have changed their email address and to ask them to update it on the pension portal.
- 3.11 Progress is underway to design new communications to market the new pension portal prior to ‘go live’. New draft user guides and videos have been made.
- 3.12 On the 23 March 2023, the Fund attended the Birmingham Association of School Business Management group (BASBM) at Villa Park, delivering a new presentation covering the cost of living and the impact this can have on members’ benefits, how we can support in ensuring younger employees are engaged with their pension savings, alive to the risks of pensions scams and supporting employers by enhancing their members’ knowledge and understanding of their benefits. The audience extended to over 150 individual schools/academies with the presentation generally well received.
- 3.13 In February the Pension Services Team attended the Sandwell Inspired Partnership (SIPS) bursar event on invitation to provide valuable updates from both an employer and member perspective to around **50** schools and academies. Feedback from the day was positive and this has led to an increase in requests to support and engage with individual schools.
- 3.14 Website content continues to be updated and there have been **394,000** web page views in this quarter.
- 3.15 Customer feedback is key to understanding our customer’s journey, highlighting our strengths and opportunities to improve the Fund’s approach to continually develop the services we offer and ensure these remain valued. Following a review of our ‘Post Event’ surveys to scheme members and the creation of a customer feedback dashboard, post-

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event surveys are now being issued to members regularly. The overall customer feedback KPI for this quarter is **91%**.

## **4.0 Employer Engagement**

### **4.1 Employer Peer Group**

4.1.1 The final session of the Fund's Employer Peer Group cycle for 2022/23 took place in March, with 13 out of the 18 registered employer representatives present. The content for the meeting included:

- Employer data reporting – discussion about the importance of data quality and an opportunity for the group to discuss the related challenges and experience to aid future developments in this area.
- Process timescales - general discussion on member feedback and comments around Fund processing times which will be taken to our internal customer engagement committee for consideration.
- 2023 Employer Health Check – discussion about delivery dates, and proposed content for the 2023 exercise. General feedback was that timing works well and it is a useful exercise.
- General communications – feedback obtained from the group on preferred methods of communications, including thoughts on the quarterly Employer Brief and comparisons to experience with other pension schemes they have dealings with.

4.1.2 Once again, this session was held virtually to accommodate employer attendance alongside their own existing priorities. As this was the last meeting of the 2022/23 cycle, all employers have now been invited to join the new cycle with the first meeting taking place in June 2023.

### **4.2 Employer Webinars**

4.2.1 The Employer Services Team has continued to deliver a programme of employer education over the quarter with 8 sessions (5 face to face at i9 and 3 webinars) delivered to 67 attendees from 38 organisations (a mix of both employers and payroll providers). Combined, these individuals represent over 150 employers within the Fund. The sessions are free to attend and provide a useful refresher for existing staff 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 following year. An increased suite of webinars is now available each month and employers are able to easily sign up via the Fund's website.

- Introduction to the Local Government Pension Scheme (LGPS)
- Leavers, Retirements and Notifications
- Employer Discretions
- Completing and Submitting your Final Statement

- 4.2.3 Feedback received following the sessions noted that attendees found the sessions useful, enjoyable and informative. They also enjoyed the interactive nature of the sessions and found them engaging.
- 4.2.4 In addition to the now standard education programme, delivery of a full suite of webinars specific to the roll out of the new pensions administration system and Employer Self Service (ESS) functionality has now commenced. 180 attendees (from 120 individual organisations representing over 600 employers in the Fund) were present at 4 ESS General Navigation sessions during the period. 100% of attendees fed back that they were very satisfied or satisfied with the training.
- 4.2.5 These specific ESS sessions will increase in delivery as the new system moves into live and to support employer transition. In addition, employers will be able to attend drop-in sessions at i9 for additional support post go-live and have also been invited to register preferences for time and date specific slots for one-to-one online support when submitting their first monthly data file.

### **4.3 Employer Engagement and 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.
- 4.3.2 During the period the Fund held 22 meetings with 18 organisations and 2 third-party payroll providers (note some employers were met with on multiple occasions during the period). Collectively these employers and payroll service providers are responsible for submitting data and payments for over 100 organisations, servicing over 40,000 members. Meetings were held for a variety of reasons including general performance feedback, monthly submission support, McCloud support, and Funding and Actuarial Valuation queries.
- 4.3.3 Work also continues on the Employer Team to target both the submission of outstanding leaver paperwork and responses to queries raised as a result of those leaver submissions ahead of both the system transition and the 2023 Annual Benefit Statement production run. Aligned to this all employers have been reminded of the importance of regularly reviewing active member lists ahead of the 2023 Employer Health Check which was issued during May.

### **4.4 2022 Actuarial Valuation: Employer Support**

- 4.4.1 Following the closure of the consultation period, the Fund's dedicated valuation team issued final results to all employers. Payroll providers were also contacted and provided with a list of rates for all clients to ensure the new contribution rates are implemented with effect from the April 2023 monthly data file submission and payments.
- 4.4.2 All employers have now been invited to provide feedback on the overall 2022 Actuarial Valuation process to enable a review of support and information provided.

## **5.0 Future Engagement and Activity Beyond the Reporting Period**

- 5.1 During May the Fund produced annual benefits statements for deferred members, this was followed up with bulk emails and 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. A similar approach will be followed for active members as their statements are published and published on their portal account in July/August.
- 5.2 From April to June 2023 the hard-to-reach project is providing face to face support targeting small housing associations, LEA schools and leisure centres across the region.
- 5.3 The Member Service Team is now preparing to deliver **17** roadshows at educational establishments across the West Midlands region with a summary to be presented in the September customer engagement update.
- 5.4 The Fund's "Tea & Teach" sessions were held during May and June, delivering **8** events with the objective to bring pensioners together face to face for refreshments and give them the chance to sit down with a Fund officer to talk about any pension concerns which they may have. We have partnered with local organisations to provide as much support and literature as possible for our pensioners. Feedback will be provided in the next customer engagement update.

## **6.0 Whole Fund and Larger Events**

- 6.1 The Fund is hosting its Employer Mid Year Review 2023 at i9 on the 4 July.. The event provides a variety of updates for employers and feedback from the event will feature in the next Customer Engagement Report.
- 6.2 HR 360, the Coventry Bursars group, asked for a member presentation at their schools and academies business meeting on the 30 June 2023. HR 360 represent the schools and academies in the Coventry area and this represented our first face to face support of the event since the pandemic.

## **7.0 Customer Service Excellence Accreditation**

- 7.1 During May the Fund undertook its Customer Service Excellence re-accreditation. A review document was completed in advance of an onsite assessment detailing evidence of the Fund's compliance with the standard. During the assessment days the assessor then met face to face with representatives from several different service areas to further investigate and verify the Fund's compliance.
- 7.2 We are pleased to report that the Fund achieved the required standard, excelling in five areas and being awarded compliance plus. We await the final report, and a full breakdown of the assessment will be provided in September's update.

**8.0 Financial Implications**

8.1 There are no financial implications associated with this report.

**9.0 Legal implications**

9.1 There are no legal implications associated with this report.

**10.0 Equalities implications**

10.1 The report contains no direct equalities implications.

**11.0 All Other Implications**

11.1 The report contains no other direct implications.

**12.0 Schedule of Background Papers**

12.1 There are no background papers within this report.

**13.0 Appendices**

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