

Pensions Board

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Report title	Communications and Customer Engagement Update	
Originating service	Pensions	
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Recommendations for noting:

The Board is asked to note:

1. The work of the Fund in improving communications with stakeholders during 2015/2016
2. The work of the Fund to improve continued engagement with stakeholders over the next year.

1.0 Purpose

1.1 To provide the Board with an update on the work of the Fund in the area of communications during 2015/16 and to outline the proposed activity for 2017.

2.0 Background

2.1 At its meeting in July the Pensions Board discussed making customer engagement one of its priorities, ensuring the Fund meets its obligations under the Pension Regulator's Code of Practice to communicate with members and employers.

2.2 This report outlines how the Fund has engaged and communicated with:

- All scheme members and their representatives (active, deferred, and pensioner)
- Prospective scheme members
- Contributing employers
- External stakeholders (such as the media, and interest groups)
- Pension Committee, Board Members and Fund staff

3.0 Work over the last year

3.1 The Fund has been striving to increase engagement with employers, to continue keeping members informed about changes to their pension, and to continue engaging with the industry on wider pension and investment issues. The Fund has delivered a wide range of communication resources by electronic means, through face-to-face events, and in print.

3.2 In February 2016 the Fund facilitated on Customer Journey Mapping workshops for employers, helping to create mutual understanding around the expectations of submitting their annual return. This followed a similar exercise in 2015 to review and revamp member benefit statements. Twenty representatives attended across the three workshops, which were able to draw out potential improvements and changes to make the process more efficient and effective for both employers and the Fund.

3.3 The Fund continues with its regular member events which include, our well attended Member Services Roadshows, conducted throughout the year. The table below shows the attendance at our member events throughout 2016.

Location	Attendees
Perry Barr Depot – Birmingham	36
Redfern Road Depot – Birmingham C.C	47
2 x Montague Street Depot – Birmingham C.C.	74
Lifford Lane Depot – Birmingham C.C.	45
Lister Road Depot – Dudley M.B.C.	70

Leys Depot – Dudley M.B.C.	68
Bournville College	23
Dudley College	25
Solihull College	49
City College Coventry	27
Wolverhampton Uni - Wolverhampton Campus	21
Wolverhampton Uni - Walsall Campus	39
Wolverhampton Uni - Telford Campus	15
Henley College	21
South City College Roadshow Event	25
Dudley M.B.C.	37
Birmingham City Council – Woodcock Street	95
Walsall M.B.C.	39
Coventry City Council	106
Solihull M.B.C.	46
Wolverhampton City Council	71
Sandwell M.B.C.	86
Birmingham City Council – Lifford House	115
Totals	1180

A total of 50 Fund presentations were delivered to 1180 attendees, these presentations were held at 41 different employers, including the district councils, universities, schools/academies and other admitted bodies.

The feedback from these presentations was 50.45% of the members rated them as excellent, 40.33% as very good, 8.86% as good and 0.36% as satisfactory.

The Fund works in partnership with Prudential to deliver a joint presentation covering how the Scheme works and tax efficient methods of saving towards the future. During this period 24 of these presentations were delivered across 9 employers, 598 members attended.

Further support has also been provided to members either through drop in sessions or scheduled one to one support sessions. In total, additional support was delivered to 408 members on an individual basis.

- 3.4 For the same period, the Employer Services team hosted 8 employer coaching sessions with over 250 attendees from across the employer base. Throughout July and November, a number of valuation briefing sessions were held for employers in addition to individual employers meetings to discuss specific valuation outcomes. These have been ongoing since May and continued at the AGM in November and through further 1-2-1 meetings in December and January.
- 3.5 To assist the Data Quality project the Fund also engaged in cross-team partnership and delivered a number of monthly return workshops for employers both at Mander House and across the District at Birmingham City University.

- 3.6 The Fund regularly reviews and updates its website content, producing a quarterly newsletter for employers, and engaging with interest groups and individuals about responsible investment and related concerns. With 2016 being a valuation year for the Fund, engagement and consultation with employers has been a key focus together with the move to monthly returns in June 2016 as we seek to improve data quality.
- 3.7 In addition to the work the Fund undertakes to ensure our members and employers receive the information they need, the Fund has also been approached on a number of occasions to write bespoke pieces for industry specific publications. Most recently, the Head of Finance, David Kane was interviewed for a piece with IPE discussing the LGPS costs framework and the work the Fund has undertaken to help develop guidance and best practice in this area to facilitate greater understanding and management of external management costs.
- 3.8 Internal communications have developed with a view to ensuring staff, Trustees and Pension Board Members are updated on a regular basis through the “media roundup” (containing a summary of industry news and information), and a monthly “employee catch up” (providing staff with an electronic newsletter, also helping reduce volume of Fund-wide internal emails).
- 3.9 Attached at Appendix 1 is an overview of the customer feedback for the services provided by the Fund from April 2016 to December 2016.

4.0 Work over the next 12 months

- 4.1 At the AGM on 29 November 2016, the Fund presented its proposals for Customer Engagement over the next 12 months, producing a Customer Engagement Plan. A copy of the plan is attached at Appendix 2.
- 4.2 The Fund will continue to engage with members and employers, this will be a rolling plan with feedback received shaping each event, with the Fund always working 12 months ahead in its engagement plans.
- 4.3 One area the Fund is keen to develop its Customer Engagement is in relation to our Pensioner members. Over the last 4 years, the Fund has engaged the services of Club Together to send our pensioner newsletter. Club Together was an annual magazine publication that offered various offers and discounts to our pensioner members. The purpose of the relationship was to use them as a platform for circulating information to our members and thereby reducing administrative costs to the Fund as the Fund through savings on postage costs.
- 4.4 With the changes proposed in May 2018 under the General Data Protection Regulations the Fund was reviewing this arrangement to ensure compliance and have since received notification from Club Together that are ceasing the publication.

- 4.5 It is proposed that the Fund revert to producing its own newsletter for pensioner members and to circulate this in print with the annual P60 payslips. The Fund already undertakes a mailing for pensioners during April and March for their P60 (depending on whether they are paid monthly, quarterly or annually) therefore it is not anticipated that any additional cost will be incurred in sending the newsletter with current print options already under review more broadly across the Fund.
- 4.6 To ensure our Pensioner members receive information that is of use to them in the newsletter, the Fund will host a number of Customer Engagement sessions in the spring and will contact groups of pensioner members throughout January and February seeking their participation for the initiative.

5.0 Financial implications

- 5.1 Communications forms part of the Fund's work and is accounted for in the annual budget.

6.0 Legal implications

- 6.1 The Fund are required under the Local Government Pension Scheme Regulations to publish an annual Communications Policy. In addition, the Fund is required to publish certain disclosure documents to our members on matters which may affect their pension benefits.

7.0 Equalities implications

- 7.1 The Fund's policy for communication has been written in consideration of the Equalities Act with no individual group affected. The Fund's proposed change in communication with pensioner members has been considered in line with the Equalities Act and while it targets a specific group of individuals, these are no more advantaged compared to the Fund's other membership group.

8.0 Environmental implications

- 8.1 None

9.0 Human resources implications

- 9.1 None

10.0 Corporate landlord implications

- 10.1 None

11.0 Schedule of background papers

11.1 None

12.0 Appendices

12.1 Appendix 1
Customer Service Statistics and Key Performance Indicators

12.2 Appendix 2
Customer Engagement Plan 2016/2017