

Pensions Committee

13 December 2017

Report Title	Customer Engagement Update	
Originating service	Pensions	
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Recommendation for noting:

The Committee is asked to note:

1. The engagement activity to date and plans for future engagement on the horizon.

1. Purpose

- 1.1 To provide Committee with an update of the Fund's customer engagement activity to date, in line with its Customer Engagement Strategy.

2. Background

- 2.1 One of the Fund's key objectives is to provide excellent customer service. In line with this objective, the Fund has published, and keeps under review, a Customer Engagement Strategy which was last presented to Committee on 7 December 2016.
- 2.2 In line with the Customer Engagement Strategy, the Fund strives to engage with as many stakeholders as possible, to obtain and consider their feedback which will help inform improvements to the service.
- 2.3 This report outlines some of the recent customer engagement activity, both the work undertaken by the Member Services team and examples of specific engagement with a variety of stakeholders.

3. Member Services Team

- 3.1 The Fund maintains a dedicated team which engages with members on a variety of subjects, to support them with what are often technical pensions matters and so as to increase their understanding of the pension benefits provided by the LGPS.
- 3.2 In total, the Member Services Team has assisted 1360 members with pension related information over this period.

3.2.1 Presentations

Fund officers have continued to deliver presentations upon request from employers. The team provide support on a variety of pension topics that are requested by an employer for their employees.

The emphasis during this reporting period has been:

- Planning, developing and enhancing our service.
- Supporting those members who are at risk of redundancy or maybe facing reductions in pay.
- Providing support and guidance to members at local authority depot sites and further and higher educational establishments using the Pension Roadshow Bus.
- Planning and delivering joint Fund and Prudential events.
- Providing an overview of the scheme and communicating the benefits the scheme offers.

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A total of 11 Fund presentations were delivered to 224 attendees, these presentations were held at a variety of different employers, including the district councils, universities, schools/academies and other admitted bodies.

The feedback from these presentations was 37.25% of the members rated them as excellent, 31.5% as very good, 22.25% as good, 8.75% as satisfactory and 0.25% as poor. Therefore, over 90% of members rated presentations as good, very good or excellent.

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 22 of these presentations were delivered across 7 employers, 331 members attended.

3.2.2 Roadshows

During this reporting period the Fund started to deliver Roadshow events at our local authority sites. The roadshow Statistics for this reporting period are:

Date	Venue	Attendees
10 July 2017	Henley College	26
20 July 2017	Sandwell Leisure Trust	8
25 July 2017	Sandwell Leisure Trust	10
24 August 2017	Amey	28
12 September 2017	Birmingham CC	102
13 September 2017	City of Wolverhampton	98
18 September 2017	Dudley MBC	15
19 September 2017	Birmingham CC	82
20 September 2017	Solihull MBC	87
21 September 2017	Sandwell MBC	92
27 September 2017	Walsall MBC	74
28 September 2017	Coventry CC	116
	Total Attendees	738

3.2.3 Satellite Site support

To ensure the Fund covers a diverse cross section of our members and employers over the West Midlands, we are targeting smaller satellite offices where members due to their role and/or work patterns are unable to attend events at larger employer sites. The departments being considered are Social Services, Libraries, Leisure Centres, recycling depots, environmental services.

3.2.4 Additional Support

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 67 members on an individual basis.

3.3 A summary of the feedback received from members attending the Member Services team events is covered in Appendix 1. Overall 98% of members were satisfied or more with the service provided by the Member Services team.

4. Pensioner engagement forum.

4.1 The Fund held a pensioner engagement forum on 18 October 2017. This is a relatively new initiative and is aimed at ensuring engagement extends to pensioner members who are currently receiving benefits from the Fund to obtain their feedback on their experience and anything else they would like to see from the Fund in the future.

4.2 The first pensioner engagement forum was attended by five pensioner members by way of a pilot forum, however the plan is to increase numbers for future events and to further define the scope of these meetings.

4.3 The pensioner engagement forum covered the following principal topics:

- Pensioner Newsletter
- Tell us once service
- The Fund's web portal
- Retirement experience
- Feedback on retirement education workshop the Fund is planning
- Proposals for the future

5. New Member Pensions Portal Promotion

5.1 The Fund implemented a new Pensions Portal in August 2017 as an upgrade in terms of efficiency and functionality on its predecessor. The Pensions Portal has been designed using member feedback and is expected to deliver efficiencies for customers, our employers and the Fund.

5.2 To maximise the number of members using the new Pensions Portal, a communication plan was developed for both the Fund and employers. Employers were also issued with a toolkit to assist them with their promotions.

5.3 The City of Wolverhampton Council were the first Fund employer to pilot the communication plan and as a direct result, saw a 19% increase in the number of members registered for the Pensions Portal. The communication plan and toolkit has now been circulated to the remainder of our employer base with the aim of increasing their Pensions Portal users.

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- 5.4 Overall, as a combined result of Fund and Employer portal promotions, the Fund saw a 102% increase in the number of activated Portal users over an eight week period compared to the previous year. Work to increase the number of Portal users will become part of the daily functions of the Member & Customer Services Teams, with progress being reported on a regular basis.
- 5.5 There are currently over 39,000 members registered to use the web-portal facility as at 30 September 2017. A breakdown of those registered and authenticated between the Main Fund and WMITA is provided below:

Registered and authenticated

WMITA - 743

WMPF – 38,889

- 5.6 There has been an increase of over 6,000 registered members over the last quarter due to the work by the member services team on promoting the new web portal and alongside promotion by several of the Fund's larger employers

6 Website Development

- 6.1 The Fund recently undertook a comprehensive review of the website to ensure that the latest information is accessible to our customers.
- 6.2 The next stage is to assess how the Fund can use the latest website technology to create efficiencies and meet ever changing customer expectations as part of the Digital Transformation Programme.

7. Customer surveys

- 7.1 The Fund has recently negotiated a customer survey as part of its telecommunications package with Windsor Telecom.
- 7.2 The optional survey will be applied to the Customer and Employer helplines and will take customers less than a minute to complete. Customers will also be able to request a call back to discuss their feedback further.
- 7.3 In addition to the telephone survey, the Fund has developed an electronic survey hosted through SurveyMonkey. A link to the survey will be added to letters and emails sent by the Customer Services team.
- 7.4 The results of the surveys, which will be reported on a monthly basis, will provide the Fund details of customer satisfaction levels and also important information which will enable any corrective or preventative action to be taken as required.

8. Birmingham Association of School Business Management (BASBM) conference

- 8.1 Following attendance at the same event in 2016, the Fund was invited to provide a workshop session at the Birmingham Association of School Business Management (BASBM) conference on 15 November 2017 where over 70 Birmingham based academies were in attendance and over 200 attendees in total (extending to LEA schools).
- 8.2 As part of the Fund's session, delegates received an interactive session which provided an overview of Fund and employer roles and responsibilities in line with the Pensions Administration Strategy, but also covered the following specific topics:
- Monthly submissions
 - Funding
 - Employer coaching
 - The new member Pensions Portal.

9. Solihull Area Committee of Parish and Town Councils (SAC)

- 9.1 As part of the Fund's drive to extend the coverage of its engagement to 'harder to reach groups' encapsulating as many different categories of employer as possible, the Fund presented at an evening meeting of the Solihull Area Committee of Parish and Town Councils on 19 October 2017.
- 9.2. The meeting was attended by around 15-20 Parish/Town Councillors and also a limited number of Parish/Town clerks.
- 9.3 The Fund officers presented on a number of topics in what was an interactive session, with areas of specific focus selected by the Councillors themselves. This included an update on developments within the Fund and the wider LGPS.
- 9.4. During the meeting, the Chairman presented to the Fund officers a letter on behalf of the Clerks primarily around issues surrounding the implementation of monthly data submissions. The Fund has drafted a formal response to the letter and has offered the relevant Clerks a bespoke employer coaching session to assist them with any issues they may have.

10. Individual ad-hoc employer engagement

- 10.1 As part of the continual engagement with participating employers, largely via the Fund's dedicated Employer Services team, there have been a number of instances of individual ad-hoc engagement with employers covering a wide range of topics. An example of this is the continued engagement with Further Education Colleges around the provision of security in exchange for contribution flexibility, but also some significant employer outsourcing initiatives/programmes.

11. Financial implications

- 11.1 Dependent upon the outcome of the Fund's website review, and in particular any decision made by the City of Wolverhampton Council over its own website provision, there could be financial implications for the Fund, both in terms of a potential change of contract terms and conditions or a change in provider.

12. Legal implications

- 12.1 The report contains no direct legal implications

13. Equalities implications

- 13.1 The report contains no direct equalities implications.

14. Environmental implications

- 14.1 The report contains no direct environmental implications.

15. Human resources implications

- 15.1 The report contains no direct human resources implications.

16. Corporate landlord implications

- 16.1 The report contains no direct corporate landlord implications.

17. Schedule of Appendices

Appendix 1 – Member Services – summary of presentation feedback