

Pensions Committee

5 September 2018

Report Title	Customer Engagement Update	
Originating service	Pension Services	
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Recommendations for noting:

The Committee is asked to note:

1. The engagement activity and informed service development.

1.0 Purpose

- 1.1 To provide Committee with an update of the Fund's customer engagement activity from 1 April to 30 June 2018, in line with its 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.
- 2.2 This report summarises engagement activity and the service development this is driving.

3.0 Engagement within this reporting period

- 3.1 The Fund has undertaken a wide range of proactive engagement with our customers and other stakeholders during the period 1st April 2018 to 30th June 2018. In terms of the number of members covered, this represents a **68%** increase on the same period last year, which reflects the appetite for these services from members and the activity of the team. A summary is provided below.
- 3.2 In total, the Member Services team has assisted **2118** members with pension related information over the period 1st April 2018 to 30 June 2018. This engagement includes presentations delivered to **978** attendees held at a variety of different employers, including the district councils, universities, schools/academies and other admitted bodies.
- 3.3 The feedback from these presentations was **45.61%** of the members rated them as excellent, **41.59%** as very good, **11.83%** as good, **0.97%** as satisfactory. Further detail on the feedback can be found in appendix A with a summary of the scope of these events covered in appendix B and C.
- 3.4 Between April 2018 and June 2018, the Fund provided **5** satellite support events to hard to reach areas across **5** locations in Wolverhampton, Walsall, Smethwick, West Bromwich and Birmingham to **60** scheme members. These have included library staff, school staff and Police support staff.
- 3.5 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 **175** members on an individual basis.
- 3.6 The Fund has developed an induction programme available for all participating employers upon invitation. During this quarter we have arranged such an event at Walsall MBC to educate their new starters of the benefits of the LGPS as part of their induction programme.

3.7 The Fund has been invited to attend a number of events being held by Academy & Schools Business Managers (SBM). During this quarter this has included the Association for Wolverhampton SBM, Birmingham SBM and Solihull SBM. The Funds presentation covered a variety of subjects including funding, administration and pensions portal promotion. The Fund received positive feedback and also a request to develop an employer web pack to increase accessibility of support for new employers

3.8 “My Pensions” portal promotion

3.8.1 To contribute towards the drive to promote the new member pensions portal, the Fund has implemented a new theme “*Be Pension Smart! – take control of your benefits*” and during this reporting period has organised pension portal drop in sessions across the region assisting **248** members register for pensions portal. Events have been delivered at **6** locations, Wolverhampton Homes, Birmingham City Council, Solihull MBC, Walsall MBC, City of Wolverhampton Council and Coventry City Council.

3.8.2 The Fund has used a range of marketing techniques to advertise the portal and is actively monitoring the impact on take-up.

3.8.3 There are now over 62,000 members registered and accessing information about their benefits using the pension-portal facility. This is an increase of c25,000 since the launch of the new platform late August 2017.

3.9 Employer Coaching

3.9.1 One of the Fund’s objectives is to partner for success, of which a key element are our customers. The Fund’s Pensions Administration Strategy (PAS) sets out the roles and responsibilities for both the Fund and our participating employers. In order to provide employers with the required support and guidance to help them meet these responsibilities, the Fund provides employer coaching sessions, with a planned schedule of events set out for each calendar year.

3.9.2 At the most recent employer coaching session held on 13 June 2018, there were 13 attendees representing 10 employers. Feedback was positive with 70% of attendees rating the session as excellent. Furthermore, the feedback showed participants found the following sections the most beneficial to them:

- Calculating pay and benefits
- Monthly Data Collection process

3.9.3 We are now exploring the possibility of creating videos / webinars focusing initially on the above elements in order to enable us to cascade these education sessions to a wider section of our employer base.

3.9.4 Aligned to the Funds objective to increase its communication with individual employers on performance and data quality and serving as an extension of the employer coaching programme, a number of bespoke employer meetings have been held during the reporting period. The aim of such meetings is to discuss data improvement tailored to each employer to ensure there is continual improvement in line with the Pension Regulator's Common and Conditional data requirements, as well as processing timeliness and accuracy.

3.10 Employer Peer group

3.10.1 Aligned to the Fund's objective to partner for success, the Fund holds an Employer Peer Group every three months.

3.10.2 The employer peer group provides the Fund with valuable feedback and allows the Fund an opportunity to trial new initiatives, procedures and ideas, before implementation, to assist both member processing efficiencies and employer performance.

3.10.3 The most recent Employer Peer Group meeting held on 5th June 2018, was attended by 8 employer representatives.

3.10.4 A number of topical issues were covered including:

- Consultation on the 2018 draft Pensions Administration Strategy.
- Presenting of the draft Employer Engagement Roadmap
- Discussion of the upcoming 2018 Employer Survey
- LGPS Amendment Regulations

4.0 Employer & Member Surveys

4.1 Employer Survey 2018

The annual survey has now been issued to all employers with the final deadline for responses set mid-August 2018. This year's survey includes core questions (used for trend analysis), with the purpose of obtaining feedback on each of the Funds various functions and the extent to which support tools available to employers are being utilised. In addition to this, a section specific to the implementation of Monthly Data collection has been included

4.2 The results of the 2018 survey will be shared with employers at the AGM in November 2018 together with a proposal of the Funds planned improvements on review of the results, and summarised for Committee at the December meeting.

4.3 Member Surveys

The rolling online member survey available through the Fund's website, has continued to provide us with a stream of member feedback.

4.4 In June, the first Deferred Benefit notification email was issued to members which also advertised the Pensions Portal and the online survey. The results have identified the difficulty that some members are having in accessing their Pension Portal account and this feedback will be used to shape Portal improvements through our Digital Transformation Programme. The survey wasn't completed by any customers during April and May, which suggests that the survey needs to be re-located to a focal point of the website.

4.5 A revised version of online survey will be updated shortly, with the aim of obtaining feedback on the customer's overall experience with the Fund, on their latest interaction with us (and the identification of that interaction), and on the various communication channels the Fund offers. As a result, we expect to receive quantifiable data that we can use to monitor trends and shape services in these areas in line with our objective to improve outcomes for customers.

5.0 Communications & Publications

5.1 During the reporting period, the Fund has compiled and provided a number of new and revised publications. The communications have been produced in line with the Fund's objective of engaging to improve outcomes for our customers through provision of key guidance, messaging and support. The Fund endeavours to ensure it is at the forefront of integrating the latest industry practice and guidance into its communications, whilst also tailoring the information it provides based on feedback from its customers, and, where possible, introduces new publications based on their requirements

- **Disclosure requirements**

In order to comply with disclosure requirements as a result of the LGPS Amendment Regulations 2018 on the 14 May 2018, the Fund has worked in partnership with several other Funds and the LGA to design appropriate member communications, explaining the potential impact of such changes on their benefits

- **Customer Engagement Strategy**

Aligned to the Fund's Customer Engagement Strategy, the Fund has provided presentations and additional support to a number of employers via group forums, therefore maximising the reach of this engagement. These group forums include the Academy & Schools Business Managers Meeting (Wolverhampton) on the 25th April 2018 and Academy & Schools Business Managers Meeting (Birmingham) on the 21st June 2018. These presentations featured new interactive sessions, encouraging the participants to consider and discuss issues for themselves.

- **Deferred benefit statement provision**

The Fund produced its annual Deferred Benefits Statements for just over 90,000 members. A bulk email informing member's that their statement could be viewed on pensions portal was issued and was complemented with further support and tool kits being made available for members use.

- **Supporting employer change**

Following the merger of Stratford College into the West Midlands Pension Fund, all of the deferred members who transferred over were issued with an annual deferred benefits statement in July.

6.0 Pension Roadshows

6.1 As part of the Funds communication plan, the Fund provides face to face support on the pension roadshow vehicle. This enables the Fund to actively engage with its membership across the West Midlands, increasing awareness of the LGPS and its benefits and promoting the Fund's member pensions portal expanding the scope for self-service. The Fund also receives valuable feedback from these events to help shape future service delivery.

6.2 During this reporting period **14** roadshow events have been delivered across a variety of locations which supported **657** members. These locations included Depots, Schools, Colleges and Universities. Please see appendix E for feedback.

6.3 The Fund has secured dates in September and October to provide events throughout the West Midlands region with delivery of our autumn annual roadshows.

7.0 Support & communication on the horizon over the next quarter

7.1 The Fund will be providing various support and communication to its customers and stakeholders in the near future, which will be covered in future Committee reports. This range of activity extends from working with LGA and other funds on development of benefit statement content for 2019 to the provision of active and deferred member newsletters.

7.2 The Fund will also continue to focus on extending reach and accessibility of support for member and employers through online services.

8.0 Mid-Year Review / Annual General Meeting

8.1 The Fund held its employer Mid-Year Review at the Molineux Stadium on 15th May 2018, to which all participating employers were invited. The Fund had around 80 attendees across a wide cross-section of the employer base, including local authorities, the education sector (higher education, further education and academies), housing associations, private and voluntary sector organisations. A variety of topics were delivered to ensure the event was informative and tailored using feedback received by

employers from previous events. Two external speakers to were involved, an economist and the Pensions Regulator. Feedback from the event can be found in Appendix D.

8.2 The Fund has set a date for our Annual General Meeting which will be held at the WV1 Bar at the Molineux Stadium on the 13 November 2018. Preparation for this event is underway.

9.0 Financial implications

9.1 The report contains no direct financial implications

10.0 Legal implications

10.1 The report contains no direct legal implications

11.0 Equalities implications

11.1 The report contains no direct equalities implications.

12.0 Environmental implications

12.1 The report contains no direct environmental implications.

13.0 Human resources implications

13.1 The report contains no direct human resources implications.

14.0 Corporate landlord implications

14.1 The report contains no direct corporate landlord implications.

15.0 Schedule of appendices

15.1 Appendix A: Member Services feedback

15.2 Appendix B: Member Services events covered 1 April to 30 June 2018

15.3 Appendix C: Member Services events attendance levels

15.4 Appendix D: Feedback from MYR

15.5 Appendix E: Pensions Roadshows feedback