

Quarterly Report – Engagement & Education

Date of Report:	31/12/2021		
Period Covered:	Oct – Dec 2021		
Prepared by:	Amanda Jupp	Upcoming Milestones Jan to Mar 2022	
Commentary		Item	Scheduled completion
<u>Annual Allowance</u>	<ul style="list-style-type: none"> Answered any subsequent AA queries on statements issued. Issued AA reminders to staff of forthcoming important dates. 	<ul style="list-style-type: none"> Update AA letters with any changes to limits, etc. 	31/03/2022
		<ul style="list-style-type: none"> Answer any further queries on statements issued. 	Ongoing
<u>Annual Benefit Statements</u>	<ul style="list-style-type: none"> Reviewed member communication costs against estimated costs for 2021 and documented for subsequent years. 	<ul style="list-style-type: none"> Develop ABS communication plan for 2022. 	31/01/2022
		<ul style="list-style-type: none"> Send initial Annual Return request to all employers. 	31/03/2022
		<ul style="list-style-type: none"> Revise Annual return video and publish to employer website. 	31/03/2022
<u>Employee Presentations</u>	<ul style="list-style-type: none"> Continue to digitally present Presentations via Teams 	<ul style="list-style-type: none"> Presentations agreed with the Olive team as required. 	Ongoing
<u>Employer Website</u>	<ul style="list-style-type: none"> 'Go Live' completed and advertised in Employer Newsletter. 	<ul style="list-style-type: none"> Update any changes as processes / legislation is amended. 	Ongoing
		<ul style="list-style-type: none"> Investigate Q & A sections on website. 	Ongoing

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<p><u>McCloud</u></p>	<ul style="list-style-type: none"> Continued Support to the McCloud team with issuing the spreadsheet to employers. 	<ul style="list-style-type: none"> Support the 'McCloud' team with queries and approach. Assist with the assessment of the subsequent stages. 	<p>Ongoing</p>
<p><u>Member Self Service</u></p>	<ul style="list-style-type: none"> Monthly review of MSS sign up figures to review effectiveness of campaigns. SCC Daily feature to encourage MSS sign up for ABS statements. Various wording and document updates as required. 	<ul style="list-style-type: none"> MSS sign up campaign using SCC daily / Jive as part of pension awareness week. Monthly report of sign-up figures. 	<p>28.02.2022</p> <p>Monthly</p>
<p><u>Newsletters</u></p>	<ul style="list-style-type: none"> October, November, and December staff newsletters produced and issued. New process changes feature added. Winter Employer newsletter produced and issued to Employers. 	<ul style="list-style-type: none"> Newsletter Schedule to be created and issued. Jan staff Newsletter created & issued. Feb staff Newsletter created & issued. Mar staff Newsletter created & issued. Spring Employer Newsletter to be created, reviewed, and issued to employers. Spring Member Newsletter to be created, reviewed, and issued to active members. Pensioner Newsletter to be created and reviewed ready to be issued with PI letters. 	<p>31/01/2022</p> <p>31/01/2022</p> <p>28/02/2022</p> <p>31/03/2022</p> <p>31/03/2022</p> <p>31/03/2022</p> <p>31/03/2022</p>

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<p><u>Surrey Pension Fund Website</u></p>	<ul style="list-style-type: none"> Updated new website with documents and amendments to standard format text. Created an addition top menu page for investment updates. 	<ul style="list-style-type: none"> Migration to new site due early January 2022. Update any broken links, etc, due to migration. 	<p>31/01/2022</p> <p>31/01/2022</p>
<p><u>Surveys</u></p>	<ul style="list-style-type: none"> Completed surveys issued to District and Borough Councils, all employers, and a selection of members. Employer survey report issued and uploaded to website. 	<ul style="list-style-type: none"> Develop retirement survey to add to pensioners letters. Review Active / Deferred member survey results and issue report. Review Pensioner member survey results and issue report. 	<p>31/01/2022</p> <p>31/01/2022</p> <p>31/01/2022</p>
<p><u>General</u></p>	<ul style="list-style-type: none"> New LGPS member website being developed by the LGA and was due to go live end of 2021. Now likely to be early 2022. New members videos in development and production. Annual update of forms and guides. Employer Relationship Manager is being developed for the whole team to use. Create Altair document list for all calculation and word documents. 	<ul style="list-style-type: none"> Links to the LGPS member site that are within our documents will need to be checked and updated as necessary. 'How To Retire' video in production by Surrey video team. Needed amendment due to change in process. Investigate development of further videos. Update forms, guides, etc, with new financial year limits. Complete migration of all employer details. Create document list and issue to Team Leaders to review their area. 	<p>Dependent upon LGA.</p> <p>31/03/2022</p> <p>31/03/2022</p> <p>31/03/2022</p> <p>31/01/2022</p> <p>28/02/2022</p>

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Key Risks

Item	Detail	Action/Update
Re-organisation to Surrey Pension Team	The reorganisation needs to be supported with extensive training courses to ensure consistent, accurate and comprehensive knowledge for all staff members.	This is likely to require additional resource from the team, resulting in delays in other areas.