

Quarterly Change Team Report April – June 2023

Summary

This report details the work of the Change Management Team over the most recent quarter. Previously elements of this report had been contained within the Service Delivery report however given the increased scope of the team it will now be reported separately.

The team consists of the following functions:

- Communications
- Learning and Development
- Projects
- Transformation

Communications

Annual Benefit Statements Annual Benefit Communications produced in preparation for active & deferred benefit statement distribution.

[ABS Video Guide](#)

[ABS Guide](#)

[ABS FAQs](#)

ABS Posters for Employers – see Annexe

Employee Presentations Presentations are now being facilitated only, with delivery by the Service Delivery team. We helped with setting up, running admin & advertising 3 new webinars to active members.

New Pension Fund Website Market research & business case made for a new Surrey Pension Fund website to replace existing website provided by Hymans.

Recent Social Media Posts As part of our new Amplified Presence plan, we have been increasing our posts on LinkedIn. We have made 9 posts within this quarter with an average Organic Impression of 216 Impressions. A sample can be found below:

<https://www.linkedin.com/feed/update/urn:li:activity:7056922795426861056>

<https://www.linkedin.com/feed/update/urn:li:activity:7057720861130137600>

<https://www.linkedin.com/feed/update/urn:li:activity:7061726017136025600>

<https://www.linkedin.com/feed/update/urn:li:activity:7077249040983183360>

Award Submissions

We have been shortlisted for both the LAPFF Good Governance & Responsible Investment Awards. We also submitted a nomination for the LGC Workforce 2023 Best Retention Strategy Award.

Newsletters

April, May & June staff newsletters issued and well received. For [June's newsletter](#) we moved the newsletter to Microsoft Sway which offers greater engagement & analytics.

[Summer employer newsletter](#) compiled & distributed via email. We are exploring moving employer newsletter to E-Shot email software which offers greater engagement, accessibility & analytics.

Active newsletter created ready for distribution alongside annual benefit statements later in the year.

Adapted existing newsletters to new accessible format in line with best practice and regulations. These have been uploaded as replacements on [Employer](#) and [Surrey Pension Fund](#) websites.

Further newsletters will be produced throughout the year in agreement with the Comms Policy which was agreed upon by the committee in the last meeting

Learning and Development

Development Focus

We had a focused workshop on the topic of personal & career development and launched the Career Pathway tool at the Whole of Pensions Meeting in June.

New Training Courses

The Introduction to Transfers online course was delivered & is available now online.

Following in person training the Customer Service Training online course now available online.

Concurrent Transfers Course is under development and will be available online soon.

Board & Committee Training

Board & Committee Training plans have been issued & are underway. Additional guidance material produced.

Projects

Project Review Board We have introduced a Project Review Board for strategic oversight & governance of continuous improvement projects. This takes place every 6 weeks and has produced productive discussion & decision-making during the sessions thus far.

During the initial session, project roles & responsibilities were defined, and a project charter document produced to ensure consistent project structure moving forward.

Current Projects We currently have 13 projects ongoing, with a further 3 projects approved by the senior leadership team to commence in the coming months. 3 of the current projects are categorised as “at risk” at this time, all have mitigation measures in place with 2 of the 3 projects expected to complete within the month of July. An overview of our current projects can be found in [Annexe CM4](#), with further narrative on all projects, including those at risk.

Transformation

Border to Coast Partner Fund Workshop Surrey Pension Team hosted a working session with our partner funds to refresh & align our principles for engagement with Border to Coast. Session was well received.

One Pensions Team Dashboard We have developed a One Pensions Team dashboard which provided the ‘red thread’ to detail all the work Surrey Pension Team in a single easy to understand format. This is being showcased for the first time during this Board Meeting & going forward will be a key piece of information between the Board, Committee, Surrey County Council & Surrey Pension Team. [See Annexe CM 1](#)

Surrey Pensions Team Specific Pulse Survey We devised and launched a Surrey Pension Team specific Pulse Survey to establish a baseline. The survey covered areas such as Demographics, Wellbeing, Career Development, Strategic Planning, etc. [See Annexe CM 3 for questions & summary of results.](#)

Post Phase 2 Transformation Review Post the completion of Phase 2 of our Transformation, the PSLT completed an organisational review to determine whether the proposed benefits from the transformation have been realised. Where needed course correction has been highlighted & actioned.

Next Steps

In the next quarter we will be working on the following areas:

- a) Launching a series of Wellbeing & Development Lunch & Learn sessions
- b) Launching a Talking Talent development forum
- c) Hosting a best industry practice session with likeminded funds to explore topics of mutual interest.
- d) Launching a programme of Benchmarking to highlight best practice and look at our performance relative to the industry.