

Quarterly Report – Engagement & Education

Annex 2

Date of Report:	14/04/2021		
Period Covered:	January – March 2021		
Prepared by:	Amanda Jupp	Upcoming Milestones April to June 2021	
Commentary		Item	Scheduled
<u>Annual Allowance</u>	<ul style="list-style-type: none"> Continuing project to correct the Annual Allowance information for members who have not exceeded the Annual Allowance limit (where an interfund has taken place during 2019/20). Annual Allowance queries from members and funds investigated and responded to. 	Members with interfund transfers completed in 2020/21; start of project for AA information correction to avoid AA exceeded list.	01/04/2021
		Annual Allowance letters and guides updated for 2020/21.	30/04/2021
<u>Annual Benefit Statements</u>	<ul style="list-style-type: none"> ABS Overall Plan and ABS Communication Plan issued and agreed, documenting the timescales and approach for the 2021 ABS. Annual Benefit Statement end of year video created and distributed to Employers. End of Year communication to Employers in January, February, and March. ABS templates tested with member information and results documented. 	Create / amend member ABS communication.	30/04/2021
		End of Year communication to Employers in April.	16/04/2021
		ABS return report to SPF detailing outstanding returns prior to and post cut-off date.	20/04/2021 07/05/2021 & 04/06/2021
		ABS video updated, recorded, and distributed.	10/05/2021
		Update & upload ABS FAQs	10/05/2021
		Update & upload ABS Guide	10/05/2021
		ABS Employer chasers commencing to obtain outstanding returns.	03/05/2021
		Commence Deferred member ABS communication via email and post.	In line with production schedule
		Commence with Active member ABS communication via email and post.	In line with production

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			schedule
<u>Employee Presentations</u>	<ul style="list-style-type: none"> Digitally presented one Presentation via Teams Agreed update of content with Olive Team 	<ul style="list-style-type: none"> Booked in 2 future presentations to date. 	N/A
<u>Employer Website</u>	<ul style="list-style-type: none"> Agreed approach with Digital Team. Drafted 10 pages of website content and issued for review. 	Review test site and confirm approach Complete draft and sign-off of website pages. Test new website with uploaded content. Go Live	Awaiting test site date. 31/05/2021 21/06/2021 05/07/2021
<u>McCloud</u>	<ul style="list-style-type: none"> Initial approach report issued and agree for data collection phase. Initial communications to Employers drafted prior to commencement of the exercise on 3 May. McCloud queries from Employers responded to. 	<ul style="list-style-type: none"> Support the 'McCloud' team with queries and approach. 	Ongoing
<u>Member Self Service</u>	<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. Various wording and document updates as required. Co-ordinating with Heywoods regarding Logo change. MSS survey report issued. 	<ul style="list-style-type: none"> MSS monthly sign up campaign using direct emails and Jive. Monthly report of sign-up figures. Update of 2021 forms and guides. 	Monthly Monthly 30/04/2021
<u>Newsletters</u>	<ul style="list-style-type: none"> January, February, and March staff newsletters produced and issued. Spring Employer newsletter produced and issued to Employers. 	<ul style="list-style-type: none"> Pensioner member Newsletter created, reviewed, and issued to members. Deferred member Newsletter created, reviewed, and issued to members. 	30/04/2021 In Line with ABS production

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	<ul style="list-style-type: none">• Spring Active member newsletter produced and issued to members.• SCC Daily feature to advertise active newsletter.	• April staff Newsletter created & issued.	30/04/2021
		• May staff Newsletter created & issued.	31/05/2021
		• June staff Newsletter created & issued.	30/06/2021
<u>General</u>	<ul style="list-style-type: none">• PI letters reviewed and updated.• Training report issued under separate cover.• Contact list review; requested and updated revised contact details for Employers.• User audit for Employer Self Service and promotion to Employers via newsletters.• Forms & guides updated for 2021 and removal of Orbis logo.	• Issue Staff Survey report to all Kingston staff.	30/04/2021
		• Issue staff survey results	30/06/2021
		• Monthly Communication meetings	Monthly
		• Full audit of documents on websites, SharePoint and on drives.	30/04/2021
		• Draft bitesize videos for Employer Self Service	30/06/2021

Key Risks

Item	Detail	Action/Update
Change of Organisational Structure.	Changes to the Orbis / Surrey CC / Surrey PF pensions group organisation resulting in rebranding of documents and guides.	Update forms / guides and letters to reflect new addresses and branding.
Lack of experienced staff to perform complex AA calculations.	The existing admin staff do not have the experience and / or capacity to be able to perform the complex calculations.	The E&E Team have taken the lead in delivering the AA project, which has resulted in the planned work being put on hold pending completion of the project.

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