

Quarterly Report – Engagement & Education

Date of Report:	30/09/2021		
Period Covered:	July – Sep 2021		
Prepared by:	Amanda Jupp	Upcoming Milestones Oct to Dec 2021	
Commentary		Item	Scheduled completion
<u>Annual Allowance</u>	<ul style="list-style-type: none"> Developed, tested, and run a bulk AA calculation tool to identify cases where the AA limit has been exceeded and discount the cases caused by interfund transfers. 	<ul style="list-style-type: none"> Complete AA calculations on all members identified as exceeding or near to exceeding the AA limit. Issue appropriate letters and statements. 	06/10/2021
	<ul style="list-style-type: none"> Requested further pay information and performed calculations on member records. 	<ul style="list-style-type: none"> Answer any subsequent queries on statements issued. 	Ongoing
<u>Annual Benefit Statements</u>	<ul style="list-style-type: none"> End of Year chasers sent to employers, who have not submitted their Annual Return spreadsheet by the deadline. Updates of employer returns received given to the SPF team. 	<ul style="list-style-type: none"> Review member communication costs against estimated costs and document for subsequent years. 	31/10/2021
	<ul style="list-style-type: none"> ABS Active members: all statements uploaded, and emails/letters issued, manual statements sent by 31 Aug. 		

Quarterly Report – Engagement & Education

<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"> Updated web pages in response to review comments. 'Go-Live' included in employer newsletter for 30 September. 	<ul style="list-style-type: none"> Update any review comments received from employers. 	Ongoing
		<ul style="list-style-type: none"> Investigate Q & A sections on website. 	Ongoing
<u>McCloud</u>	<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. 	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 for ABS statements. Various wording and document updates as required. 	<ul style="list-style-type: none"> MSS monthly sign up campaign using direct emails and Jive. 	Monthly
		<ul style="list-style-type: none"> Monthly report of sign-up figures. 	Monthly
<u>Newsletters</u>	<ul style="list-style-type: none"> July, August, and September staff newsletters produced and issued. New LGA Bulletin feature added. Autumn Employer newsletter produced and issued to Employers. 	<ul style="list-style-type: none"> Winter Employer Newsletter to be created, reviewed, and issued to employers. 	17/12/2021
		<ul style="list-style-type: none"> Oct staff Newsletter created & issued. 	31/10/2021
		<ul style="list-style-type: none"> Nov staff Newsletter created & issued. 	30/11/2021
		<ul style="list-style-type: none"> Dec staff Newsletter created & issued. 	23/12/2021

Quarterly Report – Engagement & Education

<u>Surveys</u>	<ul style="list-style-type: none"> Draft surveys created and previous survey answers reviewed to ensure appropriate action taken. 	<ul style="list-style-type: none"> Review Employer survey and issue to all SPF employers. 	31/10/21
		<ul style="list-style-type: none"> Review Active / Deferred member survey and issue to random selection of members. 	15/11/21
		<ul style="list-style-type: none"> Review Pensioner member survey and issue to random selection of members. 	30/11/21
<u>General</u>	<ul style="list-style-type: none"> New SPF member website being developed by Hymans. Documents on existing site manually migrated to the new site, prior to go live. New LGPS member website being developed by the LGA and due to go live end of 2021. New members videos in development and production. 	<ul style="list-style-type: none"> 'Go Live' on new site October 2021, subject to Hymans availability. 	October 2021
		<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. 	Dependent upon above.
		<ul style="list-style-type: none"> 'How To Retire' video in production. 	30/11/21

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