

# Quarterly Report – Engagement & Education

<b>Date of Report:</b>	31/03/2022		
<b>Period Covered:</b>	Jan – Mar 2022		
<b>Prepared by:</b>	Amanda Jupp	<b>Upcoming Milestones Apr to Jun 2022</b>	
<b>Commentary</b>		<b>Item</b>	<b>Scheduled completion</b>
<b><u>Annual Allowance</u></b>	<ul style="list-style-type: none"> <li>Answered any subsequent AA queries on statements issued.</li> <li>Issued AA reminders to staff of forthcoming important dates.</li> </ul>	<ul style="list-style-type: none"> <li>Updated AA letters with any changes to limits, etc.</li> <li>This work is moving to the Service Delivery team from 01/05/2022</li> </ul>	30/04/2022
<b><u>Annual Benefit Statements</u></b>	<ul style="list-style-type: none"> <li>Reviewed member communication costs against estimated costs for 2021 and documented for subsequent years.</li> <li>Developed ABS communication plan for 2022.</li> <li>Send initial Annual Return request to all employers 28/02/22 and reminder 31/03/22.</li> <li>Revised Annual return video and published to employer website.</li> </ul>	<ul style="list-style-type: none"> <li>Send reminder Annual Return request to all employers.</li> <li>Send deferred and active member communications as the SAS team produce the benefit statements.</li> </ul>	<p>22/04/2022</p> <p>31/08/2022</p>
<b><u>Employee Presentations</u></b>	<ul style="list-style-type: none"> <li>Continue to digitally present Presentations via Teams</li> </ul>	<ul style="list-style-type: none"> <li>Presentations agreed with the Olive team as required.</li> <li>New member presentations arranged and advertised via the member newsletter. To be delivered by the Helpdesk.</li> </ul>	<p>Ongoing</p> <p>Ongoing</p>

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<p><b><u>Employer Website</u></b></p>	<ul style="list-style-type: none"> <li>• Ongoing advertising in Employer Newsletter.</li> </ul>	<ul style="list-style-type: none"> <li>• Update any changes as processes / legislation is amended.</li> <li>• Oversee the addition of the search facility on the website</li> <li>• Investigate Q &amp; A sections on website.</li> </ul>	<p>Ongoing</p> <p>Ongoing</p> <p>Ongoing</p>
<p><b><u>McCloud</u></b></p>	<ul style="list-style-type: none"> <li>• Continued Support to the McCloud team with issuing the spreadsheet to employers.</li> </ul>	<ul style="list-style-type: none"> <li>• Support the 'McCloud' team with queries and approach.</li> <li>• This work is moving to the Change Management team from 01/05/2022</li> </ul>	<p>30/04/2022</p>
<p><b><u>Member Self Service</u></b></p>	<ul style="list-style-type: none"> <li>• Monthly review of MSS sign up figures to review effectiveness of campaigns.</li> <li>• SCC Daily feature to encourage MSS sign up for ABS statements.</li> <li>• Various wording and document updates as required.</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly report of sign-up figures.</li> </ul>	<p>Monthly</p>
<p><b><u>Newsletters</u></b></p>	<ul style="list-style-type: none"> <li>• Newsletter Schedule created and issued.</li> <li>• January, February, and March staff newsletters produced and issued.</li> <li>• Spring Employer newsletter produced and issued to Employers.</li> <li>• Spring Active Member Newsletter produced and issued.</li> <li>• Pensioner Newsletter created, reviewed, and sent to the printers, ready to be issued with PI letters.</li> </ul>	<ul style="list-style-type: none"> <li>• April staff Newsletter created &amp; issued.</li> <li>• May staff Newsletter created &amp; issued.</li> <li>• June staff Newsletter created &amp; issued.</li> <li>• Summer Employer Newsletter to be created, reviewed, and issued to employers.</li> <li>• Deferred member newsletter to be issued with deferred benefit statements.</li> </ul>	<p>30/04/2022</p> <p>31/05/2022</p> <p>30/06/2022</p> <p>30/06/2022</p> <p>31/08/2022</p>

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<p><b><u>Surrey Pension Fund Website</u></b></p>	<ul style="list-style-type: none"> <li>• Migrated to new site early January 2022.</li> <li>• Update broken links, etc, due to migration.</li> </ul>	<ul style="list-style-type: none"> <li>• Audit of all forms, guides, etc and web pages.</li> </ul>	<p>30/06/2022</p>
<p><b><u>Surveys</u></b></p>	<ul style="list-style-type: none"> <li>• Retirement survey sent to all new retirees to obtain feedback on their experience.</li> <li>• Letters and forms updated following the feedback.</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly report of retirement survey.</li> </ul>	<p>Ongoing</p>
<p><b><u>Training</u></b></p>	<ul style="list-style-type: none"> <li>• Employer training arranged and delivered by Hymans.</li> <li>• Staff training arranged and delivered by Eversheds.</li> <li>• Staff training arranged with the LGA.</li> <li>• Staff training arranged with Heywoods.</li> </ul>	<ul style="list-style-type: none"> <li>• Interviews for new Training Officer role</li> <li>• Board and Committee training plan to be developed</li> </ul>	<p>28/04/2022</p> <p>12/05/2022</p>
<p><b><u>General</u></b></p>	<ul style="list-style-type: none"> <li>• New LGPS member website developed by the LGA and went live beginning of 2022, including new logo.</li> <li>• Updated forms, guides, etc, with new financial year limits.</li> <li>• Employer Relationship Manager developed for the whole team to use.</li> <li>• Create Altair document list for all calculation and word documents.</li> </ul>	<ul style="list-style-type: none"> <li>• Links to the LGPS member site that are within our documents are being checked and updated as necessary. New LGPS logo updated.</li> <li>• Investigate development of further videos.</li> <li>• Arrange archiving of redundant documents.</li> </ul>	<p>30/06/2022</p> <p>Ongoing</p> <p>30/06/2022</p>

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	<ul style="list-style-type: none"> <li>• ‘How To Retire’ video completed and added to presentation / website.</li> </ul>	<ul style="list-style-type: none"> <li>• ‘Communications for the future’ plan to be developed.</li> <li>• New Logo standards developed and issued.</li> </ul>	<p>12/05/2022</p> <p>31/05/2022</p>
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### Key Risks

Item	Detail	Action/Update
Turnover of staff	There has been a higher than average turnover of staff for this period. The new staff will need extra assistance in developing their skills.	Not statutory items may be delayed due to supporting the training.