

Quarterly Report – Engagement & Education

Date of Report:	27/06/2022		
Period Covered:	April – Jun 2022		
Prepared by:	Amanda Jupp	Upcoming Milestones Jul to Sep 2022	
Commentary	Item	Scheduled completion	
<p><u>Annual Benefit Statements (ABS)</u></p> <ul style="list-style-type: none"> • Sent reminder Annual Return requests to all outstanding employers. • Updated ABS frequently asked questions document and published to websites. • Revised ABS member video and uploaded to website. • Published Jive article to promote ABS. • Sent member communication for all deferred members – except for paper copy requests. • Sent active member communication as the SAS team produce the ABS documents. • ABS poster and flyer produced and issued to employers. 	<ul style="list-style-type: none"> • Complete active member communications as the SAS team produce the benefit statements. • Issue ABS communication to employers. • Send all paper copy statement requests. • Publish further ABS Jive article. • Hold ABS webinar for active members. • Create ABS blog and add to website. 	31/08/2022	
<p><u>Employee Presentations</u></p> <ul style="list-style-type: none"> • Continued to digitally hold LGPS Presentations via Teams through the Olive booking system. • Member presentations completed on LGPS overview and member self-service. 	<ul style="list-style-type: none"> • Presentations agreed with the Olive team as required. • Member presentations arranged and advertised via the member newsletter. 	Ongoing Ongoing	
<p><u>Employer Website</u></p> <ul style="list-style-type: none"> • Ongoing advertising in Employer Newsletter. 			

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	<ul style="list-style-type: none"> • Addition of search facility on the website. • Updated valuation information and timeline. 	<ul style="list-style-type: none"> • Update any changes as processes / legislation is amended. • Investigate Q & A sections on website. • Monthly blog for current issues / information. 	<p>Ongoing</p> <p>Ongoing</p> <p>Monthly</p>
<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"> • Monthly report of sign-up figures. • Assisting with new Transformational Member Experience being developed by Heywood to replace MSS. 	<p>Monthly</p> <p>Ongoing</p>
<u>Newsletters</u>	<ul style="list-style-type: none"> • April, May, and June staff newsletters produced and issued. • Summer Employer newsletter produced and issued to Employers. • First Governance update created and issued. 	<ul style="list-style-type: none"> • Jul, Aug & Sep staff newsletter created & issued. • Autumn active member newsletter to be created, reviewed, and issued to members. • Autumn Employer newsletter to be produced and issued to Employers. • Governance update to be created and issued 	<p>Monthly</p> <p>31/08/2022</p> <p>30/09/2022</p> <p>Weekly/Fortnightly as required</p>

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<p><u>Surrey Pension Fund Website</u></p>	<ul style="list-style-type: none"> • Audit completed of all forms, guides, etc, and web pages. • Update website with new postal address. • Updated and loaded forms and guides with new postal address. 	<ul style="list-style-type: none"> • Review SPF website and make improvements to aid members. 	<p>Ongoing</p>
<p><u>Surveys</u></p>	<ul style="list-style-type: none"> • Retirement survey sent to all new retirees to obtain feedback on their experience. 	<ul style="list-style-type: none"> • Monthly report of retirement survey. • Create and issue employer survey. 	<p>Ongoing</p> <p>30/09/2022</p>
<p><u>Training</u></p>	<ul style="list-style-type: none"> • Employer training completed with Hymans. • Staff webinars completed with the LGA. • Staff training completed with Heywood. • Valuation Training completed for Board & Committee members. • Update and refresh of Board & Committee SharePoint site. 	<ul style="list-style-type: none"> • LOLA training portal ‘Go-live’ early July • Board and Committee training plan to be developed • Clarity and impact training for staff 	<p>01/07/2022</p> <p>05/07/2022</p> <p>08/07/2022</p>
<p><u>General</u></p>	<ul style="list-style-type: none"> • Created Altair document list for all calculation and word documents. • New Logo created with mission statement 	<ul style="list-style-type: none"> • Investigate development of further videos. • New Logo standards to be developed and issued. • ‘Communications for the future’ plan to be developed. 	<p>Ongoing</p> <p>31/07/2022</p> <p>31/07/2022</p>

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	<ul style="list-style-type: none"> Updated Altair with Communication Preferences. Created and issued staff guidance documents. 	<ul style="list-style-type: none"> Communications Policy to be updated. Employer discretions to be collated and reminder issued to employers to create/review. Migrate existing recording mechanism to Communication Preferences fields in Altair. Create and arrange promotion of Pension Awareness day Advertise and hold quarterly employer meeting. 	<p>31/07/2022</p> <p>31/07/2022</p> <p>31/07/2022</p> <p>15/09/2022</p> <p>28/07/2022</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.	Non statutory items may be delayed due to supporting the training.
Communication & training structure	Due to secondment, there has been no training officer in position for over 6 months. This has meant an increased workload for the remaining staff and a drop in the level of training provided. Under the new structure, the communications officer roles have reduced from two to one.	The new Training Officer starts 1 September 2022 but will need extensive LGPS and pensions training.