

Date:	9th May 2017
Classification:	General Release
Title:	Members' Perspective of the Pension Fund Administration
Report of:	Lee Witham Director of People Services
Wards Involved:	All
Policy Context:	Service Delivery
Financial Summary:	Limited

1. Executive Summary

- 1.1 Following the last meeting of the Pension Fund Committee, People Services have been requested to update the Pension Board on proposals to engage with members of the fund, to ascertain their views on the pension administration service.

2. Current Position

- 2.1 The Pension Board have previously been advised of issues that the Council is experiencing with BT, who provide the combined Payroll, HR and Finance services.
- 2.2 Additionally the Board are aware that the pension administrator Surrey CC has had some performance challenges, which have been highlighted within the KPI updates provided.
- 2.3 Both issues impact the pension service that members receive. Improvements to both elements are being managed by People Services.
- 2.4 The Pension Fund Committee has asked the Pension Board to prioritise engagement with members to determine their view of the pension service. Where areas of concern are identified by members, the board can then support work to address the issues to improve members' overall experience.

- 2.5 Officers are requesting that the Pension Board, approve a “Pension: Your Thoughts Survey” that will be sent out to all fund employers for distribution to their staff. They will then be able to feedback on any experience that they have had of the pension administration service. In addition we will ask Surrey CC to add the survey link with all retirements and general correspondence. It is proposed that the survey would remain open for 30 days to be able to provide a wide variety of responses and to generate meaningful data for the board to consider before making recommendations to the Pension Fund Committee.
- 2.6 Officers are proposing that the survey will ask a number of questions on the member experience when dealing with pension issues. It is proposed to focus particularly on response times and member communication and whether these met their expectations. Input from Pension Board members to the type of questions they wish to see in the survey is requested. Officers are also recommending working with Unison in the construction of the survey. The survey will be anonymous and take no more than 5 minutes to complete, to ensure as many people as possible feel able to respond and provide the most valuable data to the Board.

3. Summary

- 3.1 People Services request agreement to draft a “Pension: Your Thoughts Survey” based on input from Pension Board in consultation with Unison. The survey will be sent out to employers and asked to be distributed to their staff who have access to the WCC LGPS fund. WCC will promote the survey internally via the intranet. In addition we will ask Surrey CC to send out the survey link with retirements and general correspondence. The survey will be open for 30 days.
- 3.2 Survey results will be bought back to a future Pension Board.