

Date:	16th November 2015
Classification:	General Release
Title:	Communications and Engagement strategy – update
Report of:	Director of Human Resources
Financial Summary:	The report has no financial implications.
Report Author and Contact Details:	Trevor Webster 0207 641 2803

1. Executive Summary

- 1.1 On the 8th September 2015 the Pension Fund Committee approved the WCC LGPS Communications and Engagement Strategy 2015/16.
- 1.2 This report provides the committee with an update on progress against the strategy. Highlighted are the actions which have been completed and shown in Appendix 1 are the target dates for actions to be delivered in 2015/16 and beyond.

2. Recommendation

- 2.1 That the progress made against the WCC LGPS Communications and Engagement Strategy 2015/16 be noted.

3. Background

- 3.1 The Local Government Pension Scheme (Administration) Regulations 2013, regulation 61 requires administering authorities to prepare, publish and maintain a policy statement setting out its communication strategy for communicating with:

- Scheme Members,
- Members' Representatives
- Prospective members
- Employers participating in the Fund.

3.2 The overarching aim of the supporting WCC LGPS Communications and Engagement Strategy 2015/16 is to maximise membership of the scheme through incrementally improving information and support to all members of the scheme and prospective joiners.

3.3 The context of restricted salary increases since 2009, the unfavourable economic situation during that period and the changes in the pension regulations is recognised as a challenge to increasing membership to the scheme.

4. Specific progress made against the Communications and Engagement Strategy

4.1 Pensions AGM

4.1.1 The AGM was successfully held on the 21st September 2015 with attendance from current members of the scheme, prospective and retired members.

4.1.2 The event was chaired by the Pensions Fund Committee with presentations from Human Resources, the Actuaries, the AVC Provider and Surrey County Council.

4.1.3 Specific actions and suggested improvements to processes discussed at the AGM are currently being worked through.

4.2 Admitted Body Forum

4.2.1 The date has been set for the 4th November 2015; the agenda has been set to include teacher's pensions, LGPS legal update, and a review of processes between other providers and BT.

4.2.2 As at 2nd November twenty-one delegates have confirmed attendance.

4.3 Pension Surgeries (run by Surrey County Council)

4.3.1 A day of one to one surgery sessions is to be held in City Hall on the 6th November 2015. All slots were booked by staff within 48 hours of them being advertised and a waiting list for the next day of surgeries is being maintained.

4.3.2 This event remains very popular with staff and next dates are being planned.

4.4 Pension Board Training

4.8 An initial training day was held on the 27th August 2015, this is being followed up with individual training assessments and plans for specific training on the fund valuation and legal updates when required

4.5 **Remaining Actions**

4.5.1 All the other actions featured on the Communications and Engagement Strategy are on track and a copy of the detail is provided in Appendix 1

5 **Financial Implications**

5.1 The Engagement Plan continues to be funded from within existing HR budgets

6. **Legal Implications**

6.1 None

If you have any questions about this report, or wish to inspect one of the background papers, please contact:

Trevor Webster Tel: 0207 641 2803

**Pensions communication and engagement plan for the period
1st October 2015 to 31st March 2017**

APPENDIX 1

Task	Target dates	Required outcome	Owner	Support	Update
Admitted Body Forum	To be delivered by 31/03/2016 and again by 31/03/2017	Communication to Admitted Body Members regarding scheme changes and potential on line forms	WCC	SCC	Date Set: 4th November - 19 confirmed nominations to date
AGM	21/09/2015 & Sept 2016	Communications event with all members of the scheme regarding year end performance and looking forward to the following year.	WCC	SCC, Finance, AVC provider	Completed on 21st September. Presentations from HR, Actuaries, AVC Provider, Surrey County Council - Chaired by Chair of the Pensions Committee
AVC awareness	31/12/2015	Engagement and communication with current members regarding the benefits and process relating to AVCs	WCC	AVC Provider	On track - need to confirm the products to offer in the future.
Increase letter to pensioners	To be delivered by 31/03/2016 and again by 31/03/2017	Letter to all pensioners communicating the 15/16 and 16/17 increases	SCC	WCC	15/16 letters sent
Life Time Allowance	To be delivered by 31/03/2016 and again by 31/03/2017	Personal letters to be sent to all members who are close to the lift time allowance limit	SCC		On track - more detailed conversation to follow the sending of the annual benefit statements
Self service improvements on pensions website	Ongoing	Communicate improvements including regulation changes and the introduction of on line forms.	SCC	WCC	Included in the Surrey County Council development plan - other priorities preventing progress at present

Newsletter	To be delivered by 31/03/2016 and again by 31/03/2017	Newsletter to all members regarding scheme changes, news and the overview of process	SCC	WCC	Needs progressing in early 2016
Open House Sessions	To be delivered by 31/03/2016 and again by 31/03/2017	Two session one at City Hall , and one at Lisson Grove per year	WCC		Needs progressing in early 2016
Pensions Board Training	On going	Initial training, followed by a personal assessment and on-going support	WCC		One day training delivered - personal development assessment to be delivered next
Pensioners Member panel	To be delivered by 31/03/2016 and again by 31/03/2017	Three meetings in the year	WCC		Future of the panel being reviewed
Surgery Sessions for employees	To be delivered by 31/03/2016 and again by 31/03/2017	Three events in the year. Two at City Hall, One at Lisson Grove per year.	WCC		First event booked for 6th November 2015 - City Hall