

<b>Date:</b>	<b>6<sup>th</sup> July 2017</b>
<b>Classification:</b>	<b>General Release</b>
<b>Title:</b>	<b>Members Perspective of the Pension Fund Administration</b>
<b>Report of:</b>	<b>Jo Meagher Head of Operational People Services</b>
<b>Wards Involved:</b>	<b>All</b>
<b>Policy Context:</b>	<b>Service Delivery</b>
<b>Financial Summary:</b>	<b>Limited</b>

## 1. Executive Summary

- 1.1 Following the last meeting of the Pension Board on 9<sup>th</sup> of May 2017, the Board asked People Services to compile a survey to ask members their views on the current administration of the scheme. We are asking the board to approve the content of the survey so we can send out to members and feedback to the board at the next meeting.

## 2. Current Position

- 2.1 People Services have taken the feedback from the board, consulted with Unison and designed a Pension - Your Thoughts Survey attached as an appendix to this report.
- 2.2 You can find the survey in its current form by following the link below.  
<https://www.surveymonkey.co.uk/r/K5SLHBB>
- 2.3 The questions are designed to identify any common issues or particular pattern of concern amongst members. We have asked members what they like and what could be improved in the administration of the scheme. Feedback will be used to develop an improvement plan.

- 2.4 Since the last Board meeting, Tri- borough staff have been to South Shields and spent a number of days working closely with BT staff to resolve issues with approximately 250 individuals who had not received their ABS for 2015/16. There were an additional 500 individuals identified who had received inaccurate statements. It became clear that BT did not have staff available with the technical knowledge to deal with these issues and identify and resolve exceptions and discrepancies. This was a successful exercise and an accurate return was sent to Surrey CC at the end of May 2017. Surrey are currently working to send the 750 ABS's out by the first week of July at the latest. This was a key milestone to pass before it would be appropriate to launch the survey. We will time the survey to be launched a short while after ABSs have been received.
- 2.5 In addition the survey is informative about key areas of change. For example the 2016/2017 Annual Benefit Statements will only be available on line so we have asked about member's knowledge of the Self Service portal.
- 2.6 We have also asked about member awareness of some aspects of the scheme benefits so we can determine if those areas need to be more widely advertised. An example of this is the 50/50 scheme, which allows people to pay half the contribution sum for half the pension accrual but with full ill health and life cover.
- 2.7 Lastly we have asked members about the engagement methods that they would like for the fund to make available to them. The results of this feedback will be used going forward when we develop a new engagement plan with members.

### **3. Summary**

- 3.1 People Services have drafted a "Pension Your Thoughts Survey" with the support of Unison. The board is asked to review the content of the survey and approval to send a link out to all scheme employers to disseminate to their staff so we get a broad range of feedback over a 30 day period.
- 3.2 Feedback on the results and any proposals for improvement will be presented at the next meeting.