



South Tyneside Council

Local Pension Board

Date: 27th March 2024

Member Engagement Strategy (for information and discussion)

Report of the Head of Pensions

Purpose of Report

1. The Fund is required to provide information to its members, prospective members and their representatives to ensure they understand their pension benefits and make informed decisions.
2. An objective of the restructure of the Pensions Administration Office in 2022 was to create an enhanced focus on member services. This was primarily achieved through the establishment of the Member Services Team.
3. Member engagement is an area of priority, and the Fund is keen to seek continuous improvement in service delivery. To assist with this, the Service Plan has set an action to prepare a Member Engagement Strategy. The draft document is attached to this report.
4. The Board is recommended to review and comment on the draft Strategy.

Contact Officer:

Paul McCann, Head of Pensions

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Background

5. The Fund has a statutory duty to communicate with members and their representatives to allow them to make informed decisions. The Fund is required to publish and maintain a Communications Policy Statement which includes:
 - Its policy concerning communication with stakeholders,
 - how the Fund provides information and publicity about the Scheme,
 - the format, frequency, and method of distributing such information and publicity, and
 - the promotion of the Scheme to prospective members and their employers.
6. The Communications Policy is reviewed annually and published on the Fund's website.
7. Whilst the Communications Policy is important, it does not expand into service delivery, engagement with members and gathering and acting upon feedback.
8. Historically, the Fund has gathered limited feedback from members. Mostly at the time of annual benefit statements and annual pension updates. Over recent years, the Fund has increased its focus in service delivery.
9. In October 2022, a new team structure was implemented within Pensions Administration. Within the new structure, a 'Member Services Team' was created. This Team is responsible for providing and enhancing service delivery to members and increasing member engagement.
10. To enhance the Fund's communications and engagement with members, the Service Plan includes an action to develop a 'Member Engagement Strategy'.

Member Engagement Strategy

11. The Fund has now developed a Member Engagement Strategy and a draft version is attached in Appendix A.
12. The purpose of the Strategy is to outline how the Fund will actively engage with its members. This will ensure greater focus on service delivery, improvements to communications and enhancements to our digital solutions.

13. Members who are engaged with the Fund will have a better understanding of their pension and will therefore be able to make informed decisions.
14. The Fund has committed to engaging with members through the following channels:
 - Surveys,
 - Video tutorials,
 - Developing social media channels,
 - Newsletters, and
 - Increasing the number of online documents.
15. The Strategy also outlines how the Fund will monitor and review engagement with members to ensure continuous improvement.
16. The Strategy will be kept under review.

Recommendation

17. The Board is asked to review and make comment on the draft Member Engagement Strategy in advance of approval by the Pensions Committee in June.

Reason for Recommendation

18. To ensure the Fund has a mechanism in place to engage and communicate effectively with its members.

Member Engagement Strategy

The following is a list of the background papers (excluding exempt papers) relied upon in the preparation of the above report:

Background Paper	File Ref:	File Location
None		

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Pension Fund



APPENDIX A



Member Engagement Strategy



South Tyneside Council

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Contents

Introduction.....	3
Aims of the Strategy	3
Our Members and their Journey	4
How Our Members Can Engage with the Fund	4
Member Feedback.....	5
Engagement Goals	6
Measurement and Review	8
Members Strategy and Our Service Plan.....	8

Introduction

South Tyneside Council is the Administering Authority and Scheme Manager for the Local Government Pension Scheme (LGPS) in the Tyne and Wear and the Northumberland County areas.

Tyne and Wear Pension Fund (TWPF) is open to the five district councils in Tyne and Wear, Northumberland County Council and a wide range of other bodies that provide a service in these administrative areas.

The TWPF is responsible for administering the pension interests of over **173,000 members**.

Our members' voice is of fundamental importance to us, and we have embedded this into our governance arrangements by having scheme member representatives (provided by the Trade Unions) on both Pensions Committee and the Local Pension Board.

Our Goal

To provide an **efficient, affordable & attractive** pension arrangement that is regarded by employers and members as being an important and valued part of the employment package.

Our Aim

We aim to make pensions issues **understandable to all** and to **promote membership** of the Local Government Pension Scheme through the TWPF.

This strategy sets out how we will involve and consult with our members in line with TWPF's Service Plan. It outlines how we will engage with our members to understand their needs and expectations.

Aims of the Strategy

The strategy has four key aims, which we believe will improve the member experience and confidence in the Fund.

- **Gather feedback to understand our members' needs.**
- **Continue to develop our digital solutions and communications.**
- **Improve our knowledge to better support our members and be more responsive.**
- **Provide online tools to help our members understand their pension.**

We will strive to continuously improve the member experience and understand our members' needs, ensuring that we meet member expectations, develop our systems, and streamline current processes and working practices to improve response times. This will involve the review and monitoring of our current service effectiveness and overall performance. Through engagement with staff teams and improving our knowledge, we plan to create efficiencies within the ongoing development of our systems, including our digital transformation.

Contributing to a pension scheme is one of the most important financial decisions our members will make in their lifetime. We want our members to be confident in interacting with

our service, know what the long terms benefits of being a member will provide, and be able to make informed decisions.

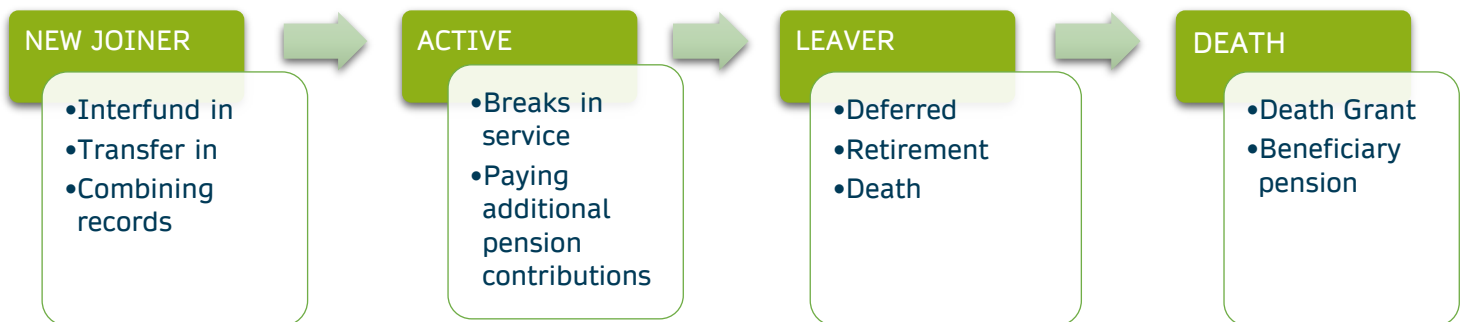
We want members to know the value of their benefits and be able to view this information either through our online services or by letter to their home address, if this is their preferred option. We want to let those who have opted out, or taken a 50/50 option, know what they will be missing out on in later life and provide signposting to services available which could support members during financial hardship.

The Local Government Pension Scheme provides a secure and guaranteed income every year to members when they reach the qualifying age. The main LGPS benefits are safeguarded by legislation and are not affected by the performance of investments. Being part of one of the largest pensions schemes in the United Kingdom is a valuable part of the rewards package offered by employers.

We will work with our members and their representatives so that they are able to interact seamlessly with us and can be part of developing the Fund's systems as well as processes to continually enhance their experience.

Our Members and Their Journey

TWPF has over **173,000 members**, all at different stages of their membership within the Fund. Our members are spread across local authorities, educational establishments, emergency services and other local employers. They are largely based across Tyne & Wear and Northumberland. Further information about our membership can be found at <https://www.twpf.info/article/10992/Full-annual-reports-and-accounts> .



How Our Members Can Engage with The Fund

Engagement is vital in order for members to understand their benefits and allow them to make informed decisions. TWPF has a dedicated Member Services Team with extensive knowledge and experience of the Local Government Pension Scheme. The team support members by providing information regarding the pension scheme as well as answering any queries via the member telephone helpline and online messaging facility.

A lot of information for members is contained within our website <https://www.twpf.info/>

Member Feedback

Members can engage with the Fund in several ways:

By visiting our website www.twpf.info	By logging into mypension on our website	By completing our feedback form on our website entitled 'Help us Improve this Website'	By calling the Member Services Team on: 0191 424 4141
By viewing our booklets/guides on our website	By post: Tyne and Wear Pension Fund, Westoe Road, NE33 2RL	By visiting reception: South Shields Town Hall Customer Service Reception	By taking part in various surveys we run for pensioners, new joiners and recipients of annual statements.

Surveys

The feedback we receive from our members is extremely important to us as this helps us shape our improvement to service delivery and ensure we are providing the information that members want. Surveys are an effective way of collating feedback from our members.

We currently survey our members as follows:

Type of survey	Frequency of data collection
New Joiner Survey	On joining TWPF
Retirement Survey	On retiring from employment
Pensioner Mailing Survey	Annually and included with Pensioner Update
Deferred Benefit Member Survey	Annually and included with Deferred Benefit Statements
Active Member Survey	Annually and included with Active Benefit Statements
Deferred Retirement Survey	On retiring from employment
Deferred Benefit Survey	On leaving employment
mypension Registration Survey	After registering mypension account
Helpline Survey	Following a call to the helpline
TWPF Public Website Survey	Annually following the pensioner, deferred and active mailings

Engagement Goals

We will engage with our members by:



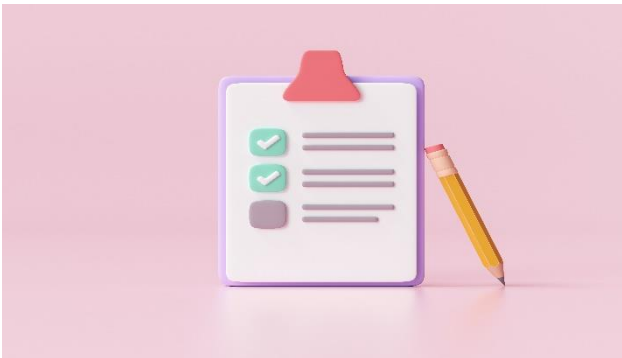
Developing social media channels

We will post updates, news, and video guides. We will also measure engagement and respond to members via these channels.



Video guides

We will provide instructional video guides that can be viewed on our website and social media channels explaining the pension fund to our members and help them to use our systems, including explanations of our documentation that may be sent to them as well as how to respond to it.



Surveys

We have developed a suite of surveys and members are asked to provide feedback on how they feel about the pension and the service they receive from us.



Online documents

Our documents can be accessed online, allowing members to review them on any device. Signed forms can be added to members online accounts, allowing transactions to be made quickly.



Communication channel enhancements

We will enhance our communication channels by introducing a secure webchat function to our website, which will also allow secure messaging via social media channels.



Training & workshops

We will provide face to face presentations, training, and workshops for our members. Where possible, these sessions will be recorded so they can be viewed online by our members.



Annual newsletters

We will issue an annual newsletter to all Fund members which highlights any issues that are ongoing in LGPS or TWPF.



Comparisons

We will contact those who have opted out of the Fund and provide them with information that explains what they are missing out on, such as death in service life cover and protection for their families, by not being a member of the Tyne and Wear Pension Fund.

Measurement and Review

We measure and review our goals by asking our members for feedback via surveys after each time they interact with us. We will continuously provide further opportunities for our members to feedback.

We will know when we are achieving our engagement goals when:-

- **We receive positive feedback from our membership.**
- **We are meeting our key performance indicator targets.**
- **We have good take up of our online services.**
- **There is a continuous reduction of queries made to our helpline.**
- **We do not receive any complaints from our members or representatives.**

Member Strategy and Our Service Plan

In summary, TWPF's Service Plan outlines that we will work with our partners to provide a high-quality service to our members. We will do this by working with employers, by providing updates to our members, listening to their views/feedback, and delivering effective ways for them to engage with TWPF. These actions will allow our members to take more ownership of their pension and promote the Fund to new members as a worthwhile investment in their future.

We have committed to devise and deliver training, consultation, and communication with our members. We will gather feedback from the members by conducting various surveys periodically. We will also increase our interaction with members by introducing online solutions such as feedback processes and e document services.

We will continue to remain accessible to all and support members accessibility needs, through the provision of verbal support from the helpline or written support services via post. We will regularly review our offer, listen to feedback from members and adapt service provision accordingly.

We will enhance the content and usability of our website to provide a much better resource for members, assisting them with any query they may have about the Fund or a document that they need to complete/return.

Finally, we have produced this engagement strategy to demonstrate we are committed to improving engagement and communication methods with our members. Our strategy will ensure we stay focused on delivering our goals to drive forward the improvements to our service.



South Tyneside Council

T W P F

**Tyne and Wear
Pension Fund**



Member Services helpline:

0191 424 4141

TWPF Website:

www.twpf.info

Address:

Tyne and Wear Pension Fund
Westoe Road
South Shields
Tyne and Wear
NE33 2RL