LOCAL PENSION BOARD – 26 JANUARY 2024

MEMBER ENGAGEMENT PLAN UPDATE

Report by the Executive Director of Resources & Section 151 Officer

RECOMMENDATION

1. **The Board is RECOMMENDED to note the update on the Member Engagement Plan agreed on the 5th May 2023 and agree the draft priorities for 2024.**

Introduction

2. Regulation 61 of the Local Government Pension Scheme Regulations 2013 sets out the administering authority's policy requirements concerning communications with members and Scheme employers. Specifically it states that 'an administering authority must prepare, maintain and publish a written statement setting out its policy concerning communications with members, representatives of members, prospective members and Scheme employers.

3. A revised fund Communications Policy was approved at the Pension Fund Committee on the 3rd March 2023. The revised policy can be found on the fund website (See link below):

   https://www.oxfordshire.gov.uk/sites/default/files/file/pension-policies/CommunicationPolicy.pdf

4. A Member Engagement Plan was presented and agreed at the Local Pension Board meeting held on 5th May. This paper presents an update to the plan and sets out priorities for next year.

5. **Member Engagement Plan Update:**

Plan Ref	Objective	Action taken and progress made in 2023
1	Add QR Codes to user communications	QR code is now used in multiple communications to direct users to My Oxfordshire Pension.
2	Website improvement	• The website has been maintained and improvements made throughout the year. No major changes have been made other than the addition of the Investment pages. • During a meeting in late November 2023, it was suggested that as the Fund was:

		o procuring tools and material at cost from our actuary, and for the benefit of employers, and o the Comms team are considering placing training videos on the website, it would be better if this content could be in a part of the website which was not in the public domain. • We have been advised by the web team that the public website must be fully public and that they would not provide a password protected section – this led to the resurrection of a discussion about creating a Fund specific website, rather than piggy-backing on the OCC website. • This is due to be discussed as part of the business planning meeting in early 2024.
3	Board representative contributing to member news	Not completed. Board members were approached in March and April 2023 but no response received. We would like to revisit this in 2024, if any Board members would like to contribute.
4	Segmenting groups of members for targeted communications	Reports to allow us to segment and target different cohorts of members were rolled out by Heywood in November 2023, and then required some tweaking. We have not yet had the opportunity to use these reports.
5	Collecting email addresses and mobile numbers	The project to collect email addresses and mobile numbers has been initiated. The actions to complete this will be largely completed by the Employer Team. Employers have been informed that they will need to start providing this information and the team have been asked to always record this information where it is provided. This is a long term project - an end date to coincide with roll out of pensions dashboard was agreed. It should be noted that during the McCloud member disclosure exercise undertaken in December 2023 we sent 18,300 letters and 25,500 emails, showing that email is already the more popular means of communication for members.
6	Collaborate with Unions	• A meeting and email discussion was held with Unison rep about ways the union colleagues may be able to help • Unite rep has been approached to discuss further collaboration.
7	Set up member panel	No action has been taken on setting up member panels (target date 30/09/2024)

8	Improved use of analytics	• received a demo of new software that could be used for newsletters and would provide better experience and far superior analytics than at present. Need to write a business case for approval. • research done into new software for sending out emails which would also provide better experience and far superior analytics than at present. Currently waiting to see what the new Transformational Member Experience (TME) is able to provide in terms of email functionality before changing our provider. • Analytics for My Oxfordshire Pension are in progress as part of the new reports rolled out by Heywood and demonstrated to us in December 2023. These have not been finalised by Heywood yet.
9	Use Linkedin to broaden reach	Use of social media, particularly Linkedin is used mainly by large metropolitan funds. Currently not thought to be of value to Oxfordshire – this decision will be reviewed each time the Communications Policy is reviewed.
10	Webinars	Discussion with the Internal Comms team at OCC means we are now able to use Vimeo to share member talks with attendees. Further changes are under discussion now we have more resource, for example. • Employer training to be partially recorded so that the more static part of the training can be accessed as a video at the user's convenience. • We are part of a sub group of the national Communications Working Group to discuss creating a video for all new members of the scheme, covering the basics. Inaugural meeting of the sub-group is in first week of January 2024.
11	Use text messaging contact members	No action taken on using text messaging to contact members. This is reliant on the completion of Action 5 and therefore suggest the completion date be revised to 30/09/2025.
12	Run member satisfaction survey	A member survey trial was undertaken in Q1 2023 covering transactions undertaken in the previous month. The trial was successful but there were some learnings in terms of: • the phrasing of the questions, • the volume of replies received and • how the team will deal with issues raised in the survey. These have been considered and adjusted and the survey will be relaunched in Jan 24 to cover transactions completed in Q3 and quarterly thereafter.

		The delay in relaunch was a conscious decision taken because there was a large amount of blanket member communications sent out in Q3 2023 (the investment survey, McCloud disclosure and AVC project)

6. Priorities for 2024

- A rolling schedule of quarterly member surveys
- Using the reports rolled out in November 2023 to segment and target specific member cohorts with relevant communications.
- The possibility of a new website built to our own specification.
- Make good progress on collecting member email and mobile numbers as a matter of process, as well as postal addresses.
- Focus on expanding our use of webinars and videos to engage members.
- Use the roll out of new technology by Heywood (the new Transformational Member Experience TME) to measure the usage of My Oxfordshire Pension.
- Write a plan for the use of upgraded newsletter software which will enable us to track its success.
- Continue to promote and run face to face member talks.

7. The Board is recommended to note the update on the Member Engagement Plan agreed on the 5th May 2023 and agree the draft priorities for 2024

Lorna Baxter
Executive Director of Resources & Section 151 Officer

Contact Officer: Mukhtar Master
Tel: 07732 826419   January 2024