

SOUTH YORKSHIRE LOCAL PENSION BOARD

15 March 2018

Consultation Programme – Annual Fund Meeting Survey

1. Purpose of the Report

To inform Members of the results of the survey carried out amongst the scheme members with a view to testing customer satisfaction as a result of attending the Annual Fund Meeting (AFM).

2. Recommendations

Members are recommended to note the analysis attached at Appendix 1 with a view to commenting on any future service delivery changes they wish to see.

3. Information

- 3.1 As part of the Authority's Consultation Strategy we are committed to carrying out member satisfaction surveys after the attendance at the authority's Annual Fund Meeting.
- 3.2 The survey was designed to gauge perceptions of the service provided by SYPA in terms of venue, travel arrangements, directions, speakers, subjects and the helpfulness of staff.
- 3.3 All delegates at the AFM were issued with a survey. Delegates were invited to give feedback on any aspect of the meeting in order for SYPA to improve on future AFM's.
- 3.4 53 out of 77 delegates returned a completed survey.
- 3.5 The analysis of these replies was carried out by the Communications and Training Team who will take on board all comments when organising future AFM's.
- 3.6 The overall "score" for the various service elements was:-

Service Element	Excellent	Good	Satisfactory	Poor
Start time	62.26%	28.30%	7.55%	1.89%
Venue	54.72%	37.74%	5.65%	1.89%
Travel arrangements	54.55%	36.36%	9.09%	0.00%

Directions	52.38%	38.10%	9.52%	0.00%
Helpfulness of SYPA staff	75.47%	18.87%	5.66%	0.00%
Navigation around venue	54.72%	35.85%	9.43%	0.00%
Hand-out/booklet	49.06%	49.06%	1.88%	0.00%
Speakers and Presentations	56.60%	39.00%	4.40%	0.00%

Of the 53 members who completed the survey and who had attended the AFM before, 16 said it was better and 33 said it was about the same.

The 1.89% poor rating for the start time represents one member who would prefer the meeting to start at 3.30pm because of his train times home.

The 1.89% poor rating for the venue again represents one member, however they didn't give their reason for this rating.

- 3.7 Appendix 1 gives the detailed analysis of the responses, and also provides individual comments received as feedback.

4. Future Performance Targets

- 4.1 Members will be aware that we publish and report on our casework performance standards. Therefore in every survey we issue, members are asked to give us a rating based on the overall satisfaction level of SYPA. The results are shown overleaf:

Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied
77.36%	22.64%	0.0%	0.0%

These results will be added to the results of the same question asked in other surveys to form the basis of our overall performance.

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Annual Fund Meeting Survey 2017

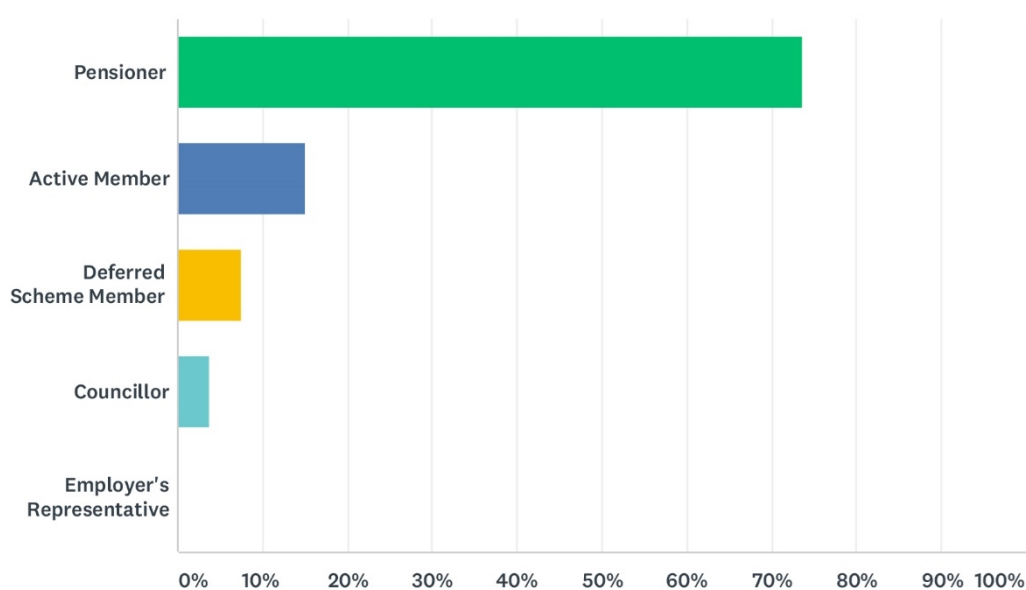


SOUTH YORKSHIRE
PENSIONS AUTHORITY

19th October. The Source Skills Academy, Meadowhall, Sheffield.

Q1 Did you attend as a:

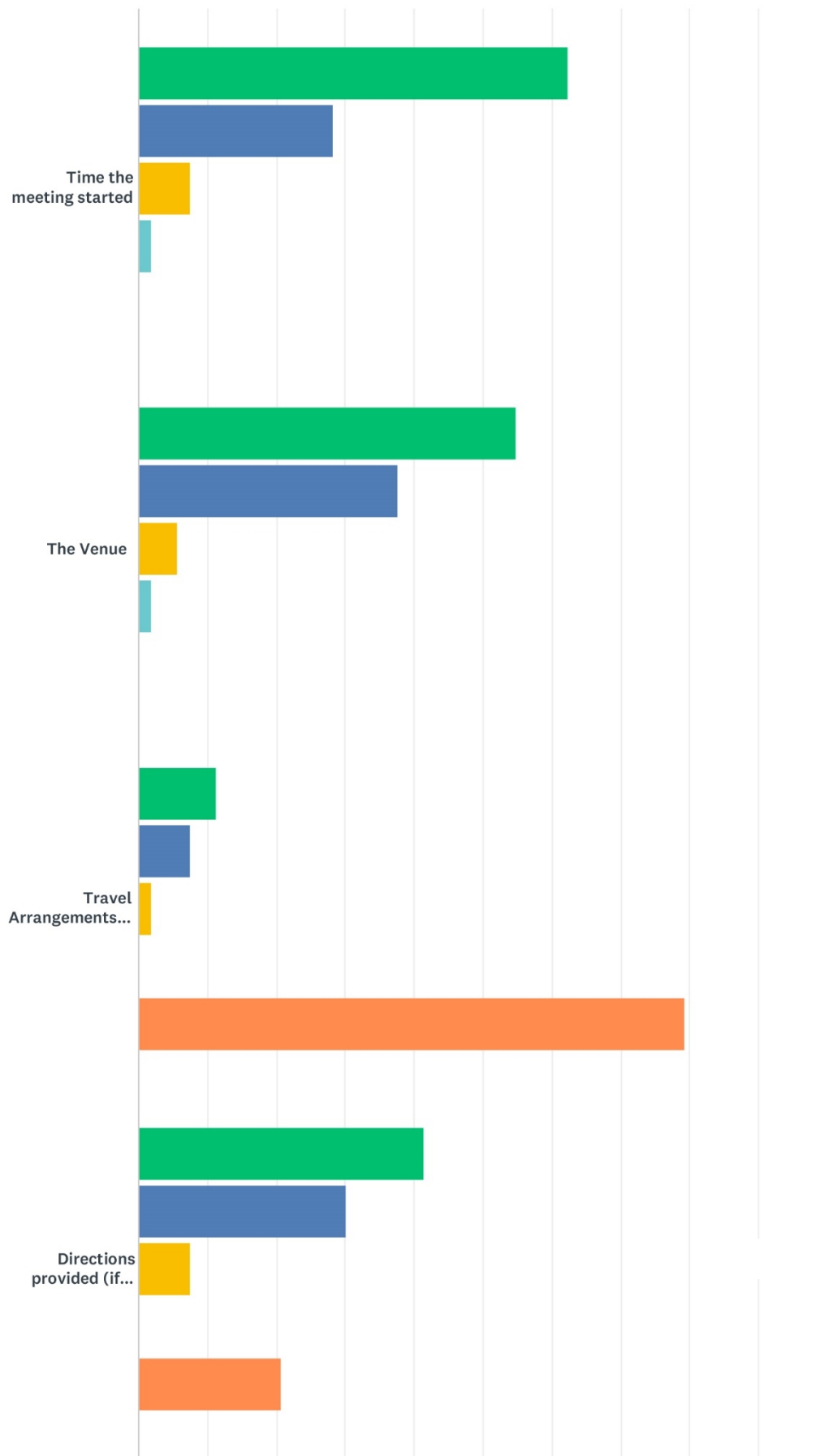
Answered: 53 Skipped: 0



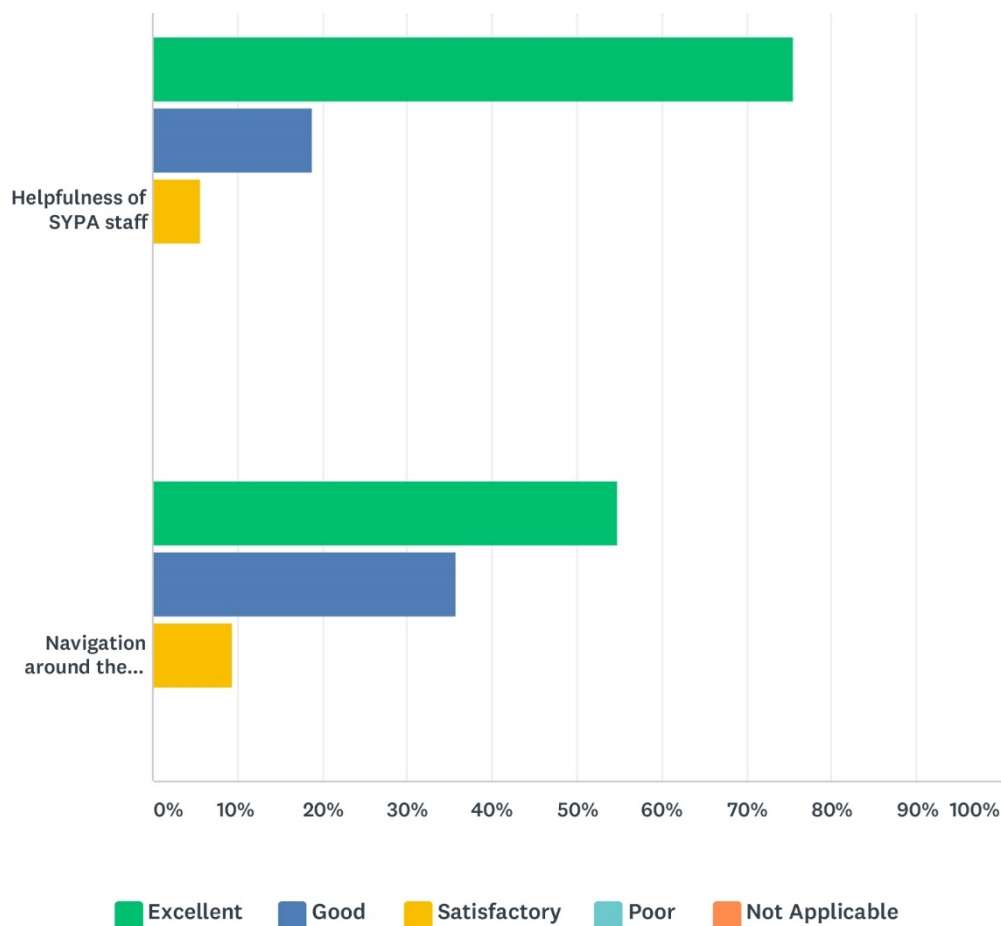
ANSWER CHOICES	RESPONSES	
Pensioner	73.59%	39
Active Member	15.09%	8
Deferred Scheme Member	7.55%	4
Councillor	3.77%	2
Employer's Representative	0.00%	0
TOTAL		53

Q2 Please indicate your level of satisfaction with the arrangements

Answered: 53 Skipped: 0



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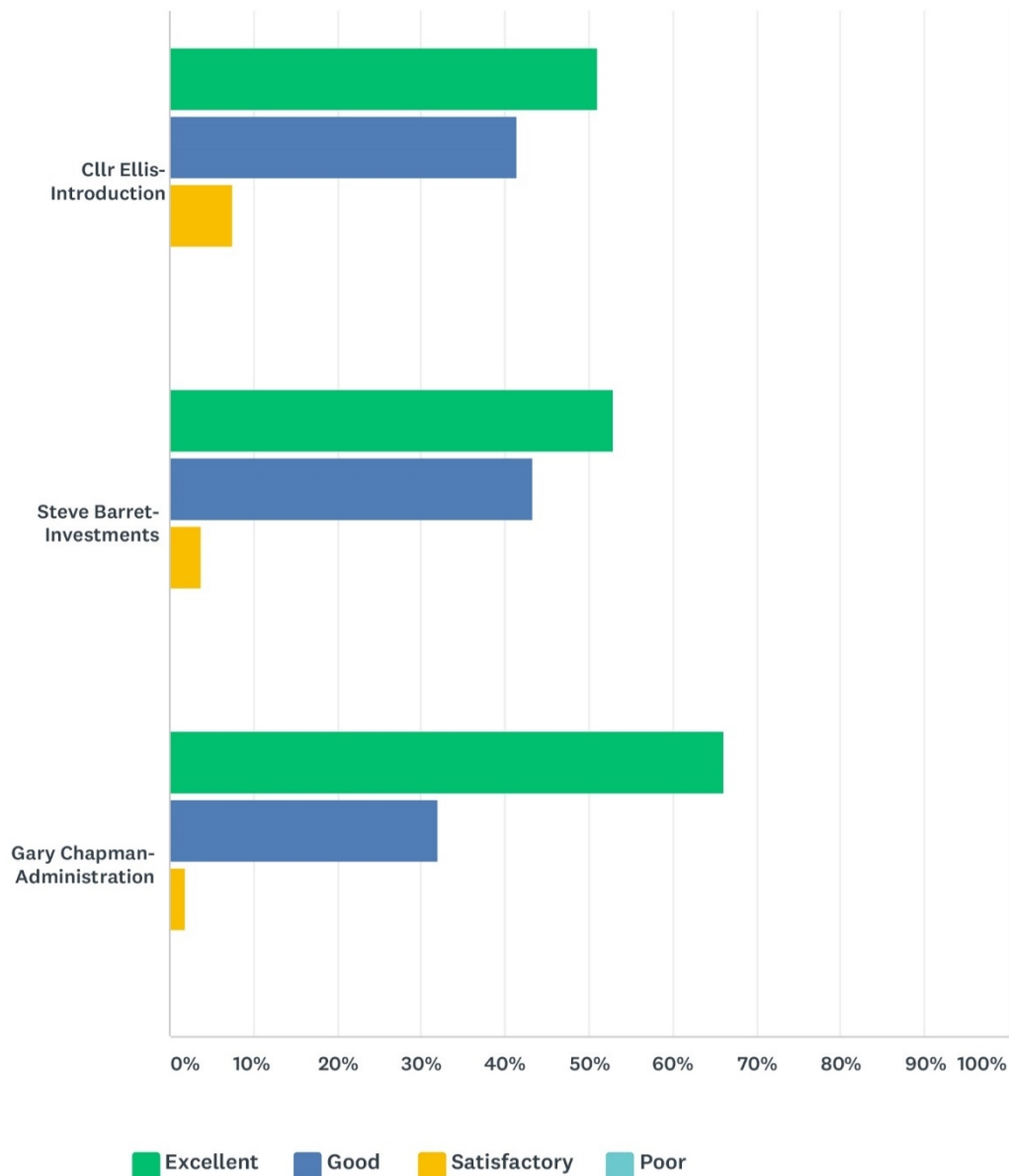
	EXCELLENT	GOOD	SATISFACTORY	POOR	NOT APPLICABLE	TOTAL RESPONDENTS
Time the meeting started	62.26% (33)	28.30% (15)	7.55% (4)	1.89% (1)	0.00%	53
The Venue	54.72% (29)	37.84% (20)	5.55% (3)	1.89% (1)	0.00%	53
Travel Arrangements (if you used the SYPA buses)	54.55% (6)	36.36% (4)	9.09% (1)	0.00% (0)	(42)	53
Directions Provided (if you made your own way)	52.38% (22)	38.10% (16)	9.52% (4)	0.00% (0)	(11)	53
Helpfulness of SYPA staff	75.47% (40)	18.87% (10)	5.66% (3)	0.00%	0.00%	53
Navigation around the venue	54.72% (29)	35.85% (19)	9.43% (5)	0.00%	0.00%	53

ANY OTHER COMMENTS

1. It would help me if the AGM in Sheffield started at 1530hrs because after 1800hrs the trains to Darlington comes in just after the local train to Redcar has gone and it's an hour wait for the next train. I don't arrive home till 2330hrs. Thank you.
2. Not a welcoming venue
3. It would be interesting in next years' report to see a breakdown of the level of attendees at the AFM for the previous 5 years
4. It would be helpful if the meeting started at 6pm and the buffet available from 5.30pm. Please also advertise that buffet is available.
5. I felt cold
6. Too hot

Q3 Please indicate your overall level of satisfaction with the speakers and their presentations

Answered: 53 Skipped: 0



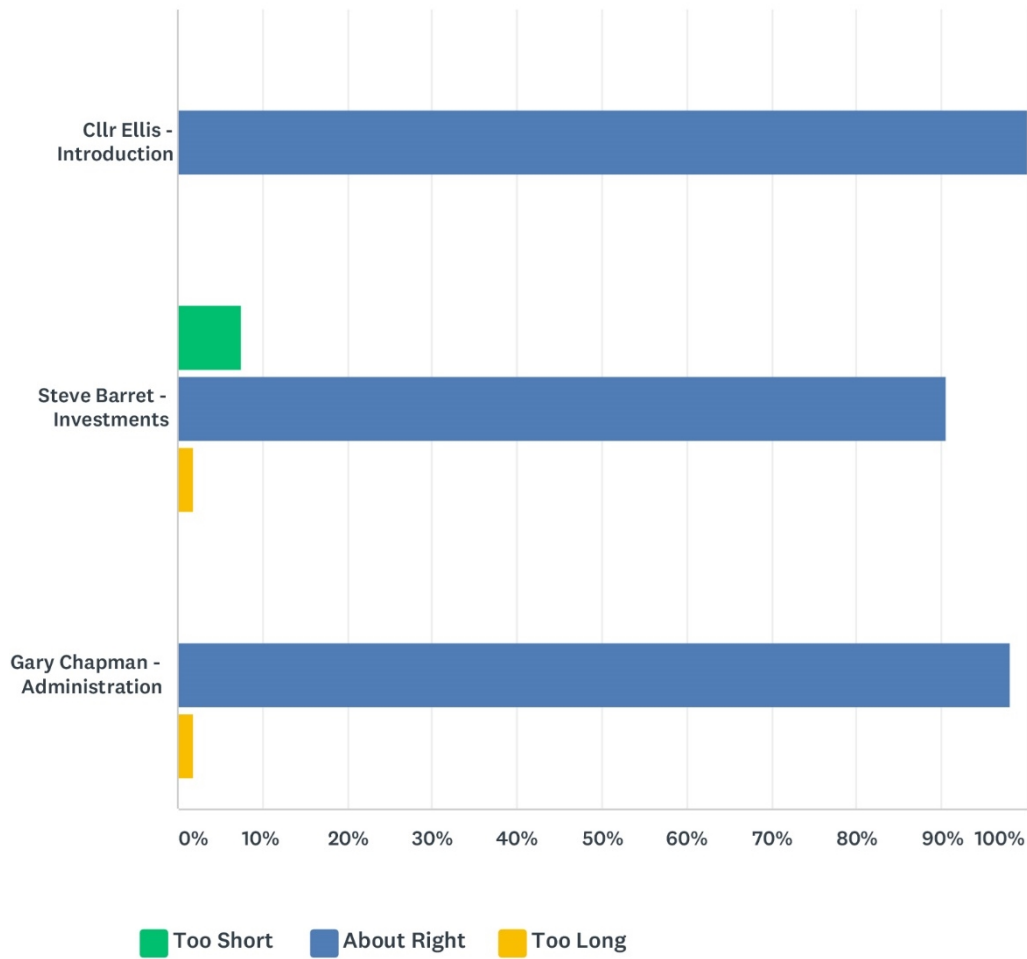
	EXCELLENT	GOOD	SATISFACTORY	POOR	TOTAL RESPONDENTS
Cllr Ellis- Introduction	50.94% (27)	41.51% (22)	7.55% (4)	0.00%	53
Steve Barrett - Investments	2.83% (28)	43.40% (23)	3.77% (2)	0.00%	53
Gary Chapman - Administration	66.04% (35)	32.08% (17)	1.89% (1)	0.00%	53

ANY OTHER COMMENTS

- 1 Although I missed 2016, I have been at most of the rest. This is the best meeting I have attended!
- 2 Clear speech & use of mic's
- 3 Good acoustics. I can hear clearly this time
- 4 All presentations clear and interesting
- 5 Well done everyone
- 6 It would help if Mr Barrett was more transparent about the ethics of which investments are made. The excuse about making the most of investments should not take the place of ethical and environmentally friendly investments

Q4 Please indicate how you felt about the length of each presentation;

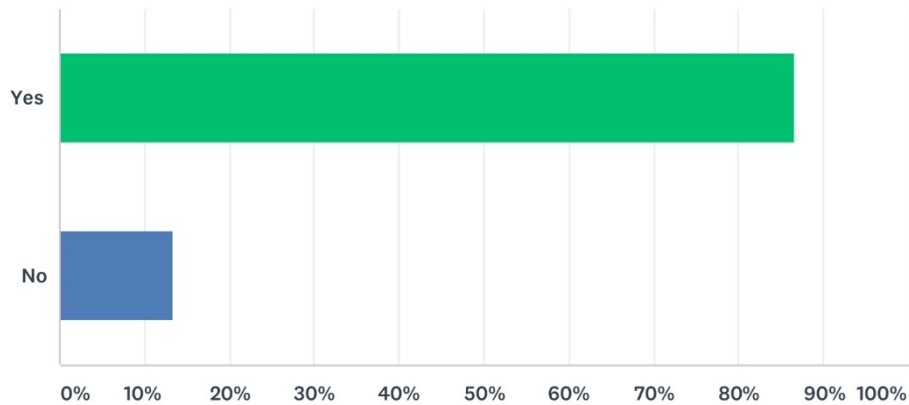
Answered: 53 Skipped: 0



	TOO SHORT	ABOUT RIGHT	TOO LONG	TOTAL RESPONDENTS
Cllr Ellis- Introduction	0.00% 0	100.00% 53	0.00% 0	53
Steve Barrett - Investments	7.55% 4	90.57% 48	1.89% 1	53
Gary Chapman - Administration	0.00% 0	98.11% 52	1.89% 1	53

Q5 In your opinion was there enough time for questions at the end of each presentation?

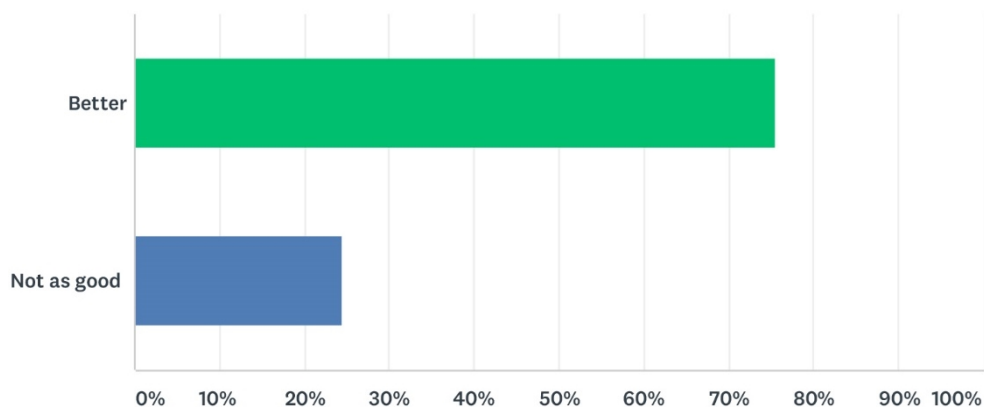
Answered: 52 Skipped: 1



ANSWER CHOICES	RESPONSES	
Yes	86.54%	45
No	13.46%	7
TOTAL		52

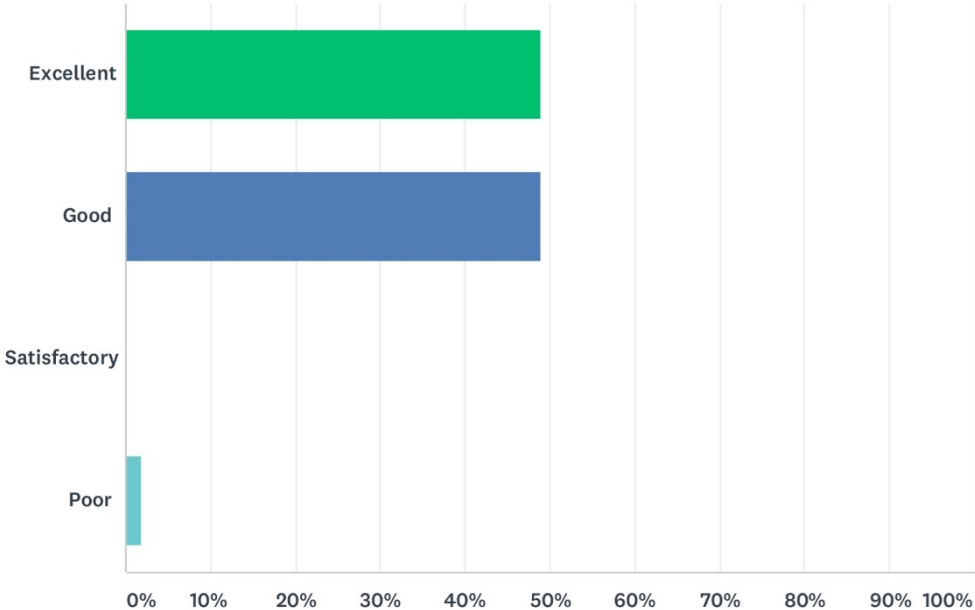
Q6 What do you think to having questions after each individual presentation, in your opinion is it better or not as good as having one question session at the end?

Answered: 53 Skipped: 0



Q7 What do you think to the AFM 2017 hand-out/booklet?

Answered: 53 Skipped: 0



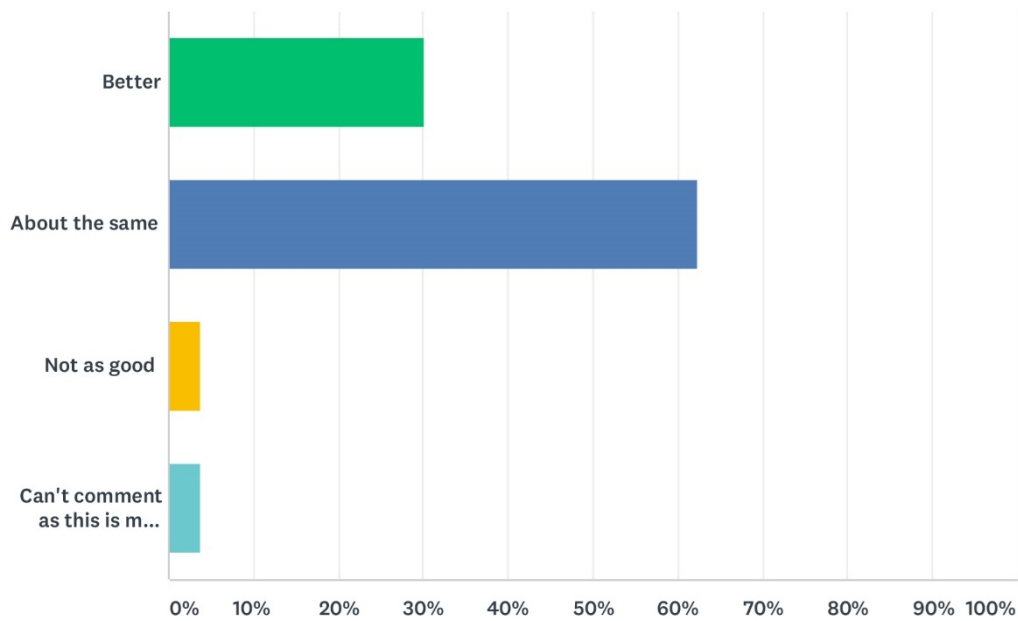
ANSWER CHOICES	RESPONSES	
Better	75.47%	40
Not as good	24.53%	13
TOTAL		53

ANSWER CHOICES	RESPONSES	
Excellent	49.06%	26
Good	49.06%	26
Satisfactory	0.00%	0
Poor	1.88%	1
TOTAL		53

- 1 I can only attend the Sheffield AGM
- 2 Insufficient information about the Border to Coast arrangement.
- 3 On the whole good, however the displays on pages 9 and 21 could be clearer with larger print and different more easily to distinguish colours for the text
- 4 It would be helpful to have links to various aspects mentioned including a section on how the SYPA is engaging with companies like Shell and BP in reducing their fossil fuel involvement
- 5 Short & precise

Q8 If you have attended the AFM before, how does this year's event compare to previous AFMs, was it:

Answered: 53 Skipped: 0



ANSWER CHOICES	RESPONSES	
Better	30.20%	16
About the same	62.26%	33
Not as good	3.77%	2
Can't comment as this is my first AFM	3.77%	2
TOTAL		53

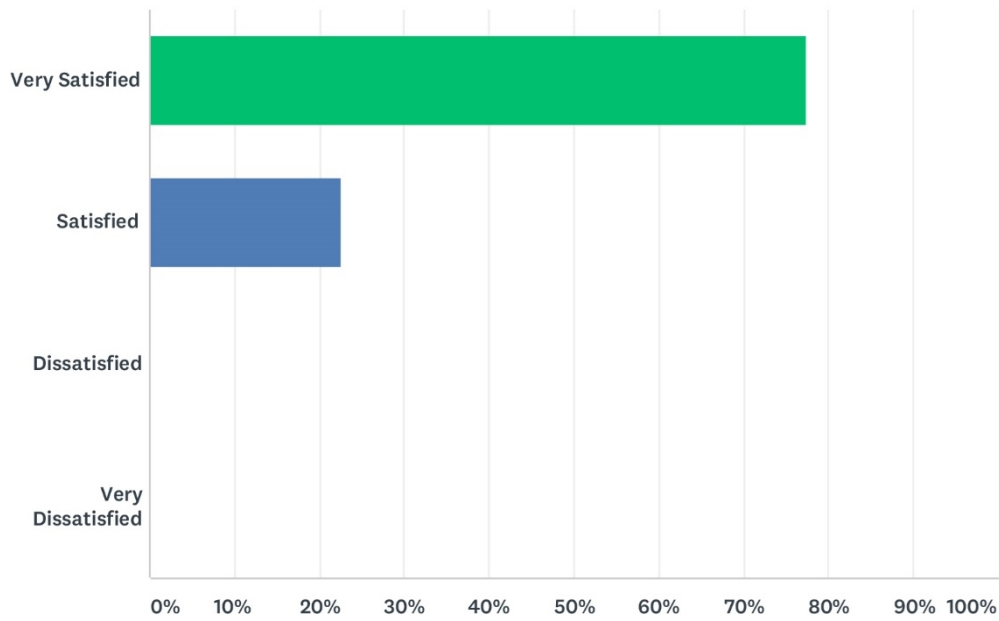
Q9 Please let us have any comments on any aspect of the meeting.

Answered: 11 Skipped: 42

- 1 Slightly changed the way it has been conducted fair out very well
- 2 Best Yet
- 3 Excellent location with good public transport access
- 4 Not enough publicity prior to the event
- 5 My comments is the meeting was very good
- 6 May I suggest a summary review of key points over the previous 12 months and considerations which may affect the fund over the next 12 months
- 7 Good
- 8 The questions were answered better than in 2015, although the questions in the presentation were answered too briefly. I would like a more detailed response to the questions relating to climate change please.
- 9 All aspects very satisfactory
- 10 It would be helpful if there was a jargon buster in the booklet for such terms as 'equities' and other types of funds, and 'UPM'.
- 11 Top table at the same level as members makes for poor viewing & hearing

Q10 Aside from this meeting, with every survey we also like to ask members, how satisfied are you with the overall performance of SYPA?

Answered: 53 Skipped: 0



ANSWER CHOICES	RESPONSES	
Very Satisfied	77.36%	41
Satisfied	22.64%	12
Dissatisfied	0.00%	0
Very Dissatisfied	0.00%	0
TOTAL		53