SOUTH YORKSHIRE PENSIONS AUTHORITY

LOCAL PENSION BOARD

14 March 2019

Report of the Head of Pensions Administration

REVIEW OF EMPLOYER SURVEY

1)   Purpose of the Report

To update members on the outcome of the Employer Survey which was recently issued to all employers in the pension fund.

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2)   **Recommendations**

Members are recommended to:-

- note the results of the Employer Survey and the key areas the administration team propose to focus on based on the feedback received

- comment on any additional areas that Members consider may require additional focus

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3.   Background Information

3.1   At the annual Employer Forum held on 29 November 2018, SYPA officers indicated that an employer survey would be issued to all 480 employers in the Fund. The survey was intended to gauge current levels of satisfaction and assist SYPA to identify areas where we might need to focus our efforts in supporting the employers in the Fund going forward. A total of 89 responses were received to the survey between 17 December 2018 and 21 February 2019 which provides a meaningful response on which to draw conclusions. This report summarises the main outcomes and potential areas for development.

4.   Satisfaction Levels

4.1   Employers were invited to comment on their level of satisfaction in a few key areas and the results are as follows:-

Subject Area	% of Employers Satisfied/Very Satisfied
Receiving general information	100%
Assistance with queries/questions	96%
Being kept up to date with changes	99%

The results of these questions suggest that current communication levels are, in the main, satisfactory to employers.

Employers were also asked about their **overall** satisfaction with the service they received from SYPA and these responses were as follows:

Very Satisfied	32%
Satisfied	66%
Dissatisfied	2% (1 respondent)
Very Dissatisfied	0%

4.2 The results above provide a reasonable level of overall assurance that SYPA is meeting the needs of employers. However, in order to understand a bit more detail about employer requirements, employers were also asked the following supplementary questions:-

- What do you think we can improve about the administration service you receive from us?

- What could we do to assist YOU with the service you provide to YOUR employees?

These questions solicited a range of responses. **Appendix A** sets out these responses and, where appropriate, we have described the action we propose to take as a result of the feedback received. Members are invited to comment on any of the feedback and the proposed actions.

5. Monthly Data Collection

5.1 Members will be aware that this service went live from 1 April 2018 so it was timely to ask a number of questions around the effectiveness of this process from an employer perspective. 75% of employers responded that they did not have any problems getting the information they require for the monthly returns from their payroll system. This still leaves 25% who do have difficulty. This suggests there is still some manual involvement for employers which is unfortunate. Regrettably this is a difficult area for SYPA to assist with as we are only asking for information we require to administer the LGPS and do not have any detailed knowledge of employer's individual payroll arrangements.

5.2　One area we can assist with is by providing an effective guide to the Monthly Returns process. Employers were asked a number of questions around the existing monthly returns guide and the responses were as set out overleaf.

Statement	% who Agree/Strongly Agree
I need to refer to the Guide to complete the monthly returns	63%
There are areas of the guide that could be improved	53%
The guide is pitched at the right level	75%

This feedback suggests that the Guide is well used but that there are areas for improvement. A number of helpful comments accompanied the responses to these questions and these will be used to help support a review of the Monthly Returns guide by the Data Team in the next few months.

6.　Employer Pension Information Centre (EPIC)

6.1　Members may be aware that many years ago SYPA developed an online portal (EPIC) which is essentially a library of forms and documentation about various aspects of the LGPS designed to support employers. Questions around the value of EPIC were included in the survey and the responses were as follows:-

Statement	% who Agree/Strongly Agree
EPIC keeps us up to date with changes to scheme rules	93%
EPIC highlights points and timescales in which our organisation must take urgent action and/or respond	87%
It's easy to navigate and find what we need	67%

6.2　Employers were also asked about the usefulness of certain areas within EPIC and the responses were as detailed below.

	Very Useful	Useful	OK	No use*
Membership	13%	43%	40%	4%
Correspondence	7%	45%	44%	4%
Retirement Costs	9%	40%	45%	5%
Forms & Booklets	11%	53%	34%	2%
Ill-health	8%	47%	40%	5%

*One respondent identified that they answered 'no use' simply because they had not used EPIC to source this information.

The survey results suggest that EPIC is a valuable tool for employers but it is in need of review if it is to be of greater benefit. A number of useful comments were made by employers as to how to improve the content which will be factored into the review.

7. Training

7.1 Employers were asked to comment on the value of existing training and support and the responses are set out below.

	Very Useful	Useful	OK	No Use
Employers Forum	17%	36%	41%	6%
Online Demos	7%	40%	47%	6%
Written Guides	13%	36%	45%	6%

Employers were also advised that SYPA were looking to review the types of training methods that we were offering going forward and were asked to rank by choice which methods they would prefer. The following table sets out the "adjusted" rankings to provide an overview of the training methods that employers would favour.

Type of Training	Points Score
Written Guides	216
Online Demos	204
Workshops	187
Webinar	185
Training Days	182
Employer Forum	139

7.2 The main conclusion to be drawn from these responses is that employers would favour a variety of training methods – though clearly the increased use of written guides is something that employers wish to see. SYPA intends to reorganise the current team structure to provide an increased focus on employer training and these results will be factored into the training plan once these resources are allocated.

7.3 It is worth noting that the Employer Forum scored lowest amongst the training 'types' but it is unlikely to be meaningful to draw any conclusions from this because only 26% of the 53 respondents to this particular question had attended the Employer Forum. Of the 14 respondents who answered a question in relation to the Employer Forum, 12 rated it 'Excellent' or 'Good' and only one rated it as poor.

8. Implications and risks

- Financial – None.
- Legal – None.

- Diversity – None.
- Risk – None.

Jason Bailey
Head of Pensions Administration

01226 772954
jbailey@sypa.org.uk

Background papers used in the preparation of this report are available for inspection at the offices of the Authority in Barnsley.