

## **Appendix 6A**

### **Member and employer feedback surveys**

Currently the Fund operates just one formal customer service feedback mechanism – the Retirement Feedback Questionnaire. This is available online and promoted in the retirement pack for retirees. This was originally paper-based with a pre-paid return envelope. In April 2016 it went online. The results are reported to the Committee and Board on a quarterly basis (Appendix 6). Since then take-up has been low and comments often relate to the employer performance rather than the Fund. This can skew the satisfaction results for the Fund.

Members' feedback can also come through the website (Contact us section) and through email, letters, telephone and face-to-face on an ad hoc basis. The Fund captures and acts on this on a case-by-case basis. The Fund also has a defined procedure for complaints – culminating in the IDRP process.

Below are proposals to revise this survey, as well as to introduce and pull together other existing feedback mechanisms to give increased sources of feedback to reflect the fund as a whole.

### **Feedback proposals**

We are proposing that these are the formalised methods for gathering feedback, which can then be reported to the Board and Committee as well as being used as a management tool in terms of possible adjustments to service provision.

#### **For members:**

##### **1. Pension clinics feedback**

Simple paper-based 1-5 star rating, plus comments box. This will be developed into an online survey fulfilled using iPad/tablets at the clinic

##### **2. General customer service feedback**

“How did we do...” Online customer service survey, promoted in all communications – letters, emails etc. Utilise QR codes as well as weblink to survey.

8 questions based on 1-5 star rating with comment box. Members contact details can be added for response if requested. This replaces the Retirement Feedback Questionnaire and can be used for all service areas.

##### **3. Website feedback**

“Please rate your experience on our website” online survey on every webpage. Simple 1-5 star rating with comments box.

**4. Website “pop up” survey**

A quick poll/survey that can be added to the homepage of the website for views on particular issues. Usually a Yes/No survey with a percentage result.

**5. Annual survey for members**

Online customer service survey promoted in the Active member newsletter (August), Deferred member newsletter (August) and the Pensioner member newsletter (May).

**6. Random sample customer service survey**

A random cross section of members, for whom we have recently carried out work, will be sent a link to the online general customer service questionnaire.

**7. Telephone sampling**

Once a member telephone enquiry has been completed they will be asked if they are happy to give feedback on how their call/enquiry was dealt with. This random sample surveying will be carried out by the Quality Assurance team.

**8. Other ways for informal and ad hoc feedback. Formal complaints can also be taken via these methods**

1. Contact us form on website
2. Comment/complaint/feedback section on “my pension online”
3. Letters / emails / telephone

**For employers:**

Feedback will be sought in the following areas.

Employer feedback forms to be fulfilled using SurveyMonkey facility. This allows bespoke surveys to be produced quickly and then emailed directly to the attendee/employer. Analysis is part of the online package, enabling results to be produced quickly.

**1. Employer training feedback**

20+ events per year. Survey emailed to attendees post-attendance

**2. Employer events feedback (Forums and Conference)**

4+ events per year. Survey emailed to attendees post-attendance (with hard copy available for Conference)

**3. Employer annual survey**

Assessing feedback on service provided by APF and training needs

#### 4. Website “pop up” survey


A quick poll/survey that can be added to the homepage of the employers website for views on particular issues. Usually a Yes/No survey with a percentage result

In 2018 the Fund will be developing a range of online training tools and guides for employers provided on the employers’ website – feedback mechanisms will be built into these to gauge take-up and views.

### Examples of proposed feedback forms:

Website feedback

**Please rate your experience on our website**



Comments





Customer satisfaction feedback

**How did we do...?**

**Please rate us and how we dealt with you:**

(1 star = poor, 5 stars = excellent)

**We were...**

|                                |                                                                                     |
|--------------------------------|-------------------------------------------------------------------------------------|
| Professional and knowledgeable |  |
| Delivered what we promised     |  |
| Kept you informed              |  |
| Polite and friendly            |  |

3

Treated you fairly



Gave accurate info



Delivered on time



Overall satisfaction with Avon Pension Fund



Comments

Submit Feedback