Service Delivery Plan

2015/16–2017/18

MUNICIPAL PENSION PLAN

PENSION CORPORATION

CONTENTS

Executive Overview 1

Environmental Scan 2

Service Overview 3

Core services for 2015/16–2017/18 3

New products and services 5

Cost Overview 6

Reporting Cycle 8

Performance Reporting 9

Executive Overview

OUR PURPOSE THE PENSION CORPORATION MAKES THE PENSION EXPERIENCE EASY FOR THOSE WE SERVE.

Over the course of the previous three-year service delivery plan, the corporation provided exceptional customer service to your members and employers, while focused on being the trusted advisor to the board on finance, policy and communications initiatives. We made significant progress on new services to enhance member and employer experiences, and put in place foundational strategies and infrastructures to transform the way the corporation provides services on behalf of your board.

We believe the *2015/16–2017/18 Service Delivery Plan* builds on the successes of the previous plan; it will enable us to respond to environmental changes that continue to affect your plan. By focusing on the long-term vision described in the strategic plan (*From 12 to 21: Our Way Forward*), we are confident the corporation will continue to make the pension experience easy for those we serve.

The service delivery plan summarizes the environmental scan we took to reaffirm pressures and opportunities. It outlines current and new services that will enhance the overall service experience. In addition, it sets out the reporting cycle and the service standards we will meet over the course of the plan.

...we will have regular opportunities to review progress and make adjustments

The service delivery plan is built on both the environmental scan and important conversations with the board and its governance committee. We recognize the need for ongoing dialogue with the board about our services and adjustments that may be required to meet changing environmental conditions and evolving needs. During the life of this service delivery plan, we will have regular opportunities to review progress and make adjustments.

Environmental Scan

OUR DIRECTION

THE PENSION CORPORATION IS TRANSFORMING TO MEET THE CHANGING EXPECTATIONS OF PLAN MEMBERS, TRUSTEES, EMPLOYERS AND STAFF.

The corporation's service delivery model will continue to evolve the way we inform, interact and transact with the board, members and employers. From member-centric communications tied to member life events to enabling members and employers to interact and transact through multiple service channels, the corporation continues to perform in the present while preparing for the future in a cost-effective manner, ensuring great value to all stakeholders.

The following drivers were confirmed as having the most impact on the corporation's ability to provide services on behalf of the board.

DRIVER	IMPLICATIONS
Rising stakeholder value expectations	Develop scalable and flexible solutions
Growing complexity and diversity in plan design and administration	Be proactive, anticipatory and out front on key issues (e.g., legislative and regulatory changes)
Evolving demographics and expectations for services among clients	Offer services that keep pace with client needs and expectations
Increasing importance of information and process management as a core competency	Develop integrated process and information management systems that enhance operational effectiveness and improve business intelligence to provide a positive end-user experience for members, employers and staff

Service Overview

Core services for 2015/16–2017/18

Member Services		
Direct Services	• Enrolments • Monthly pension payments • Purchase of service estimates • Purchase of service finals • Reciprocal transfers (inbound, outbound) • Termination estimates • Termination finals • Retirement estimates • Retirement finals • Death benefits • Disability benefits • Marital breakdown claims	• Member enquiries via letters, email, phone and walk-ins • Establish and maintain member records and accounts • Changes to post-retirement group benefits coverage • Cost-of-living adjustments • Temporary benefits • Tax reporting • Proactive outreach • Garnishees (CRA and FMEP)
Member Education and Training	• Your Pension Your Future • Thinking About Retiring	• Member pension information multi-media
Communications and Online Member Services (segment-specific approach where applicable)	• *Welcome to the Plan* • *Member's Benefit Statement* • PensionFacts • Transactional forms • Web (My Account) • Satisfaction Survey Program • *Welcome to Retirement*	• Semi-annual advice statements (retirees) • *After Work* (2× per year) • Pension estimator • Personalized purchase cost estimator • Nomination of beneficiary • Address changes for inactive members • T4A/NR4 (retirees)
Employer Services		
Direct Services	• Collect and reconcile plan member data • Collect and reconcile contributions	• Pension adjustment tax reporting
Online Tools	• Message Board • Member verification tool • LTD Start/Stop form • Secured and general employer website • Ability to self-manage user access	• E-Remit (to pay pension contributions) • Secured access to active member information, pension estimator and purchase cost estimator
Communications	• Employer Bulletin	• Employer Newsletter
Support	• Employer enrolments • Employer withdrawals • Changing terms and conditions for employer participation	• LTD plan approvals • Employer compliance
Education and Training	• Employer education and training • Employer education seminars and workshops	• eLearning • Education for new employers • Employer manual

Service Overview (cont´d)

Board Services		
Financial	• Cash management and payment of expenses and benefits* • Regulatory reporting and registration fees • Financial analysis and advice • Expert advice and analysis for matters before the board and committees	• Group benefit monitoring and reporting • Inflation adjustment account modelling • Actuarial valuation data support • Periodic support for selection of actuary and auditor
Communications	• Data and analysis requests • Expert advice and analysis for matters before the board and committees • Plan *Annual Report* • *Report to Members* • Board Communiqués • Appeals brochures* • Plan website*	• Develop board-specific communications products • Strategic communications plans • Plan branding* • Develop, print and distribute mass communications* • Support media relations • Member and employer focus groups
Policy	• Expert advice and analysis for matters before the board and committees • Changes to plan rules, including federal and provincial regulatory filings • Working with regulatory authorities on behalf of the board	• Legal, legislative and compliance updates • Support the board's appeal process • Trustee Orientation Program • Plan Advocacy and Outreach, including daily media monitoring

* Includes relevant board services allocated based on proportional number of active and retired members

New products and services

New services target two key areas.

1. Compliance activities and plan design changes—these services are a high priority, ensuring compliance with legislative and plan design changes.
2. Enhancing the member and employer experience—this will include developing member-centric communications products and a multi-channel service delivery approach that enables self and assisted service.

Proposed service or product	Benefit to stakeholders
Compliance activities • *Pension Benefits Standards Act* implementation	Continued compliance with the legislative framework
Plan design changes	Long-term sustainability of the plan
Plan website redesign and build	Enhanced member, employer and trustee experience, ease of use and access to relevant information
My Account enhancements for all segments • Member direct contact • Paper suppression • Document centre • Co-browse	Enhanced member experience through self and assisted service
My Account—retirees • Address changes • Nomination of beneficiary changes • Bank information changes	Enhanced member experience through self and assisted service
My Account—active members • Retirement application	Enhanced member experience through self and assisted service
My Account—inactive members • Pension estimator	Enhanced member experience, better understanding of the benefit statement at a personalized level
Employer gateway	Enhanced employer experience through self and assisted service
Multi-channel contact centre	Enhanced member experience through a more personalized interaction with the corporation
Member-centric communications products • Products to be determined	Enhanced member experience, better understanding of their plan benefits
Dedicated IT services for board secretariat	IT services that reflect the unique business needs of the board

Cost Overview

WE PROVIDE VALUE FOR THE SERVICE DELIVERY COSTS INCURRED BY THE PLAN.

The three-year service delivery plan and the funding required to deliver this plan ensure we will continue to provide enhanced member and employer service experiences.

A focus on efficient processes and integrated information management systems will provide cost-effective services in times of increased volume pressures and service expectations—this long-term view ensures a sustainable, cost-effective service model going into the future. We believe that cost increases for increased volumes and new services over the course of this service delivery plan will be similar to those of the previous plan.

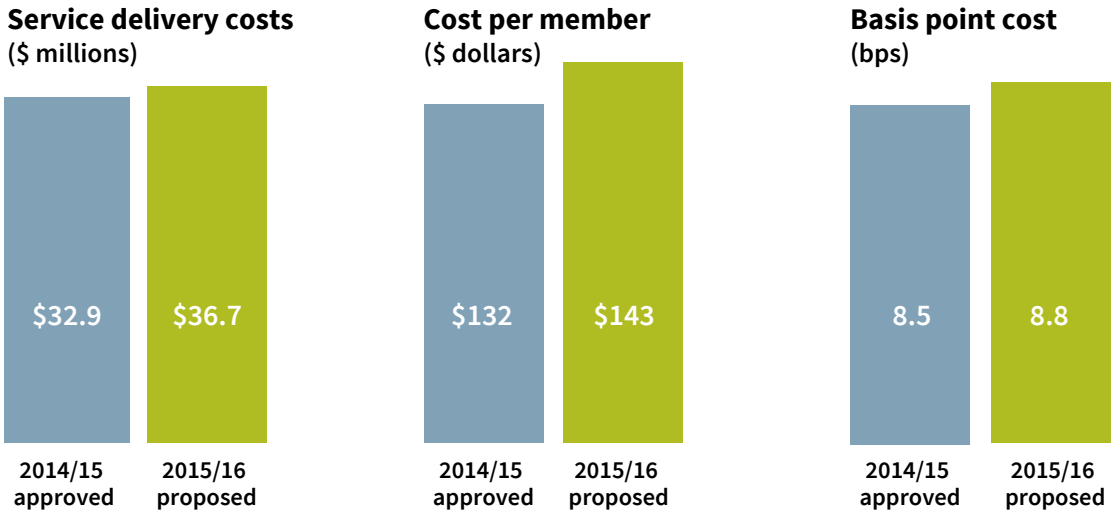
The corporation will update the board annually on the activities within the service delivery plan and the associated service delivery costs. Your plan funds its respective share of the corporation's operating and capital expenses, less investment and miscellaneous income and amortization. All costs to the board are allocated using the agreed upon cost allocation method outlined below.

Components	Cost allocation method
Member and employer services* Active and employer services (including communications) Retired member services Cash management services **Total member and employer services**	Proportional number of active and retired members
Direct board services Communications design services Plan design and policy services Financial services **Total board services**	Direct costs based on levels of support provided
Other costs Major business application (e.g., plan redesign costs) Specific board requested products **Other costs**	Cost allocations will be applied as is appropriate on a case-by-case basis
Board secretariat services Board secretariat services **Total board services**	Direct costs approved separately

* Includes relevant board services allocated based on proportional number of active and retired members

Cost Overview (cont'd)

THE COSTS FOR 2015/16 ARE AS OUTLINED BELOW:



Excludes pension board secretariat services, GST and variance tolerance

Reporting Cycle

MARCH

FOCUS: Approval of service delivery costs

Administrative agent's report
- Write-off and settlement report
- Financial report summary
- Legal and legislative updates

Service delivery costs discussion for next corporate fiscal year

NOVEMBER

FOCUS: Mid-year reporting, service delivery plan review

Administrative agent's report
- Service delivery plan update
- Service dashboards
- Quality Service Index
- Write-off and settlement report
- Financial report summary
- Plan rules compliance report
- Legal and legislative updates

JUNE

FOCUS: Year-end reporting

Administrative agent's report
- Service dashboards
- Quality Service Index
- Write-off and settlement report
- Disclosure report
- Service delivery costs
- Financial report summary
- Peer benchmarking results
- Plan rules compliance report
- Legal and legislative updates

Annual financial results and inflation adjustment account modelling

Performance Reporting

Service (timeliness)	Measure	Standard/target
First pension payment*	Percentage of first pension payments made on time	98% paid on time, 100% within 14 days
Termination payment	Time from receipt of termination estimate chosen to termination payment	Average 28 days
Death payment	Time from receipt of confirmation to next pension payment	Average 28 days
Pension estimate	Time from receipt of request to pension estimates sent	Average 14 days
Termination estimate (option)	Time from receipt of application to termination estimates sent	Average 14 days
Purchase estimate (service cost quote)	Time from receipt of request to purchase cost quote sent	Average 28 days
Telephone service	Time to answer	90% within 120 seconds
Written enquiry	Time from receipt to response (further broken down by active and retired)	Average 7 days

* Measure and standard/target revised from original agreement as approved by the board.

Performance Reporting (cont'd)

TO BE REPORTED IN THE ADMINISTRATIVE AGENT'S REPORT:

Quality Service Index										
		Weighting (%)		Standards	Results (%)					
Survey results	**Volume**	Component	Total	Target	Sep	Mar	Sep	Mar	Sep	Mar
Actives		50.0		Very good or good						
Members										
Seminar participants										
Recent retirees		12.5		Very good or good						
Long-term retirees		12.5								
Employers		25.0		Very good or good						
Employers										
Seminar participants										
Total			**100.0**							
Overall QSI score										

Service	Measure
My Account registration	Number and percentage of active, inactive and retirees registered
My Account activity	Number of usages: • pension estimator • purchase of service estimator • address changes • nomination of beneficiaries • other services implemented during term of service delivery plan