2025 National Public Sector Pension Forum – Roundtable Questions

Client Service & Digital Services

Contact Centre Technology
- How have you integrated new contact-centre telephony solutions? What platforms did you choose and why?
- What challenges arose during implementation and how did you overcome them?
- How are you measuring success and member satisfaction post-deployment?

Digital Service Enrolment
- Do you automatically register members in your secure portal (e.g., MyAccount)?
- Which systems and workflows support this process, and how seamless is the member journey?
- What lessons have you learned around adoption rates, communication strategies, and change management?

Communication Modernization
- How are you transitioning from paper-based mailings to digital channels?
- Which digital formats (email, SMS, in-app messaging, web notifications) have delivered the best ROI?
- How do you ensure compliance, accessibility, and security in your digital communications?

Power of Attorney (POA) Access
- Do your POAs have restricted or full access to member portal accounts?
- How do you authenticate and monitor POA activities and maintain an audit trail?
- What best practices have emerged around oversight and fraud prevention?

Member Identification Standards
- What forms of identification do you accept for routine transactions?
- Do you apply different ID requirements or materiality thresholds for different types of payments?
- Do you accept expired ID credentials?

Member Transactions & Lifecycle Management

Operationalizing Purchase of Service
- How do you cost purchases? Do you use already reported data and inflate?
- Do you allow members to purchase partial service? If so, what's the smallest increment?
- Do you allow installment payments? How do you track them? What software do you use?
- What payment options are available (e.g., cheque, e-transfer, direct debit)?

- Do you allow members to use DB funds to buy DB funds when no reciprocal transfer agreement exists?

Managing Member's Death
- How do you learn about plan members' deaths? (e.g., vital stats, dec data, interprovincial ISAs)
- What is your process for locating beneficiaries or estate contacts?
- What tools do you use to recover overpayments when estate contacts can't be found?

Employer Oversight

Employer Audit
- What is your overall approach to managing employer audits?
- What challenges have you encountered during fieldwork, and how have you addressed them?
- How do you structure your audit team for effectiveness?
- How do you present recommendations to employers to encourage action?
- Have you implemented KPIs with employers to improve data quality? What successes can you share?
- Have you benchmarked your audit findings or processes? What did you learn?

Plan Administration & Design

Subsidized Leaves
- Do you subsidize all or part of the member portion for statutory leaves (e.g., parental, medical)?
- What has the uptake been and what barriers surfaced?
- For those without a subsidy, what factors (funding, policy) have influenced this?

Education Sector Enrolment Eligibility
- How do you define eligible employers in public education?
- What criteria apply to independent schools, First Nations schools, etc.?
- What governance challenges have you faced in interpreting "public education"?

Adapting to the Changing Nature of Work
- What plan design changes have you made (or are considering) for phased retirement, part-time, or gig work?
- Have you explored pro-rata accruals, variable contribution rates, or hybrid models?
- How are you forecasting future work trends (e.g., remote-first, portfolio careers)?

Data Management & Security

Member Account Hygiene
- How do you structure and operationalize cyclical outreach and data validation for inactive/unreachable members?
- Are you using predictive analytics to identify at-risk accounts?
- Do you have automated processes, health checks, or a data/outreach plan?

Cybersecurity & Fraud Prevention
- Do you monitor for compromised digital credentials even without account compromise?
- What is your process for notifying members?

Internal Operations & Staff Development

Operational Communications KPIs
- What KPIs do you use to measure internal communication effectiveness?
- How do you track staff engagement with communications?
- Can you share examples of impactful KPIs?

Knowledge Assets & Usability
- How do you measure the impact of knowledge assets (e.g., work instructions) on staff productivity?

Quality Assurance Program
- How do you measure adherence to processes and output accuracy?
- What KPIs do you use to track accuracy and error rates?

Career Development & Support
- What practices do you use to illustrate and communicate career paths?
- How do you support career growth and development?