

East Sussex Pension Fund: Communications Review

Background Information:

The East Sussex Pension Fund (ESPF) has undertaken a Good Governance Review over the last 12 months to reset its strategies, policies and procedures, together with establishing a new Fund team structure and starting to bring Pensions Administration back “in-house” from the Surrey Shared Services Pension Team. All this is to ensure the effective operation of the ESPF comprising 77,000 members and 130 employer organisations, supported by investments of £3.8bn.

ESPF Communication Issues (not exhaustive)

It has been identified that improvements are required in how the ESPF communicates with its members, employers and outside interested parties.

The Pension Administration Team, as part of Surrey Shared Services Pension Team, were able to assess the Surrey Pensions Communications Team. This will not now be available.

The ESPF has a website, currently maintained by Hymans Robertson (the Funds current actuaries, but this is changing), but this is very static and under-utilised.

The ESPF is challenged by a number of pressure groups for which there is not a consistent approach to responding.

The ESPF and Administration Team send out communications to members and employers, but it is not consistent in format, language and style.

The ESPF does not have a communication brand.

The ESPF does not have a specific member of the team whose responsibility is Communication.

The Purpose and Requirements of the Communication Review.

Purpose: Help ensure communications are timely, engaging, accessible, accurate, clear and of good quality. To promote engagement with members and employers and improve understanding.

Requirements:

To review existing communication provision within the ESPF, including the Pensions Administration Team, and report back to Pension Board and Pension Committee.

Engage to with members of the Pension Board, Pension Committee, members and employers to assess views on current experience of communication and how it may be improved.

To provide recommendations for future communication approaches and the means to achieve this, including, but not exclusively:

- ESPF communication brand and style
- Websites and social media
- Staffing structure to support recommendations
- Designing the communication objectives for the Scheme
- Consideration of how the communications will be delivered, including:
 - E-communications – whether and how to move to paperless/online communications.
 - Use of alternative media – such as online materials, webinars, AGM style meetings, blogs.

- Overall design & style of communications – for example use of Scheme branding, design and/or artwork.
- Consideration of appropriate accessibility criteria and objectives
- Consideration of the Scheme's membership and potential target audiences including nudge emails and SMS updates in developing the strategy
- Cost/benefit considerations, including seeking indicative budgets proposals to achieve the strategy, and
- Development of Key Performance Indicators (KPIs) in relation to measuring the success of the Scheme's communication strategy

Timescales:

- A briefing report to Pension Board (16 Nov) and Pension Committee (30 Nov)
- Conclusion report to Pension Board and Committee in March 2021, with recommendations for implementation from 1 April 2021, including a 12 month plan:
 - List of existing communications in 12 month cycle
 - Identifying additional (regular and/or ad hoc) communication items and or changes to existing communications approaches
 - Development of timing, number of communications, audiences, key messages (where/if applicable)
 - Dovetailing with the existing newsletters and other projects
 - Understanding the implications of communication on the pensions' helpdesk and administration team
 - Liaising with key stakeholders regarding implementation of the agreed communications plan

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28 October 2020