# East Sussex Pension Fund – communications review

## Summary

Moving the communications for the East Sussex Pension Fund 'in-house' offers the chance to refresh the conversation with members, pensioners and employers, to target communications more effectively and to further enhance the fund's public standing.

The first task of pension communication is to help the fund meet its legal obligations and its duty to give timely, accurate and useful information to everyone who benefits from its investments. These goals are more likely to be achieved by developing communication which feels relevant and engaging and is also clear and easy to navigate. Communicating effectively and efficiently should benefit not only everyone with a stake in the pension fund but also those who administer it, given the pressure on their time and resources.

This review therefore tries to suggest both what might be considered good communications practice for this type of business and the structures (staffing, resources, platforms, and timelines) to enable it. It assumes resources will be limited and that the development of communication will be incremental. There is an understanding that the fund's overall aims are not about growth and recruitment but rather about improving existing operations.

The first section of this report is a review of current areas of communication and, where appropriate, recommendations of where they might be developed. The second section suggests an approach and structure for delivery.

As a broad summary, the suggested key themes for development of communications, are:

1. **Establish a clear brand for the East Sussex Pension Fund to give it a distinct identity to help build the relationship with members, employers, and other stakeholders.**
   A distinctive identity will capture what people value about the ESPF and express that through tone, language, visuals and style of communication. This identity might draw on the key themes of security (the advantages of a defined benefit scheme) and lifestyle (how regular engagement with your pension plan shapes your quality of life). The fund should invest effort and resources in developing its brand to dictate its design and other communications. All main 'badging' should be of ESPF, removing references to Orbis or other local authorities.

2. **Invest in, and integrate, digital communication tools, especially email newsletter software, to manage and target different audiences effectively and help drive self-service.**
   Online transaction, if it's done well, is easier for both customers and for the fund. Buy email

newsletter software to manage communications with members and employers which will make it easier to segment approaches and to evaluate success. Make the portal the centre of online activity by giving it much greater prominence on the website. Create online rather than paper forms. Consider greater use of video webinars and other more personalised types of communication.

3. **Tell a strong and clear story about the fund's actions on environmental, social and governance issues.**
ESPF has a positive story to tell about the work it's doing to respond to climate change and other ESG concerns but this is not very visible. Work should be done to establish a clear and easily found narrative on these issues and to show the momentum behind it. This will help the 'silent majority' of stakeholders understand the fund's position but also help streamline the process of responding to campaigners.

All these suggestions, and others, are explored in more detail in the review below. It also identifies many existing strengths in the current communication which should be retained.

The review is based on analysis of current publications and activity; conversations with pension fund staff and committee members; the survey carried out with employers; and, on observation of communication from other organisations working in the same field.

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# Part One - Review of current communications

## Strategic objectives and messaging

There is no prominent 'pull out' of a mission statement or overall objective on the website or elsewhere in ESPF comms.

Although the website is primarily customer-facing and so deals with the practicalities of pensions, it would still be possible to capture the fund's core objective(s) in a short form which can run like a thread through the site and other forms of communication.

This might feel particularly useful given the increasing focus on balancing performance and security of investment with ethical and social impacts, especially climate change.

There is information about the fund's objectives, but it tends to be buried in documents. For instance, according to the Investment Strategy Statement:

*"The primary objective of the Fund is to provide pension and lump sum benefits for members on their retirement and/or benefits on death, before or after retirement, for their dependants, on a defined benefits basis. This funding position will be reviewed at each triennial actuarial valuation, or more frequently as required."*

Perhaps this might be reviewed and distilled into a new sentence or two which sums up the essential purpose of the fund which finds simpler, non-technical language and includes some emphasis on its ESG agenda.

To give an example, the Local Government Pension Fund, uses this phrase:

"The LGPS is a secure, flexible and tax efficient way of making sure you have a decent pension to look forward to in retirement"

ESPF could produce its own simple story in this vein. Perhaps something like:

*"The purpose of the fund is to give members a secure and decent pension when they retire by investing wisely and ethically on their behalf and ensuring they have a say in how this is managed."*

At the next layer down from this short objective statement, it might be useful to develop slightly longer (circa 150 words) templates covering the other main strategic areas: investment strategy, ESG and/or divestment, relationship with employers etc. These would be a middle layer between the short mission statement and the full strategies such as the Statement of Responsible Investment Principles, the Investment Strategy Statement, etc.

A further issue is that of the relationship and hierarchy with the LGPS. Does the East Sussex Fund intend to position itself as the intermediary/local deliverer of the national scheme and uphold LGPS's brand to members as secure and reassuring? Or does ESPF intend to be the 'primary' brand for customers, with LGPS used more prominently in communications with employers to aid them with professional/technical standards and support?

> Recommendation: Draft and agree a single-sentence statement that summarises the fund's objectives to act as a thread running through ESPF communications. Draft and publish short statements to describe the strategy for key areas of operation, including investment, ESG, offer to employers. Make these easy to find (for example, near the website's top layer of navigation and as prominent 'box-outs' in longer documents or reports).

## The ESPF brand

The move to in-house administration of the pension fund offers an opportunity to clarify and strengthen the ESPF brand.

There are two main areas where the brand might benefit from review:

*Distinctiveness*

This is partly about organisational identity. Currently, if a pension member or employer receives a newsletter, they'll see multiple overlapping corporate identities, including Orbis, ESPF, LGPS and several other local authorities in the scheme. Similarly, the pension fund website looks entirely different from the Orbis-branded portal. In future it would be much better to develop and apply a single identity – East Sussex Pension Fund – to all communication. If the connection to LGPS is valuable and reassuring to members/employers then it could be 'nested' one level down from the ESPF brand. For example, key webpages might include a small footer with LGPS logo and text to explain that ESPF is a part of the LGPS scheme.

But distinctiveness also comes from emphasising and embedding what is different about ESPF. What are the features which would make members and employers glad to be a part of it and not a different pension scheme?

For example; the security and stability of a defined benefit scheme, the responsiveness of a fund close to its local membership, the 'family' feeling of people who've all worked in the public sector Whichever of these (or other) sentiments are most resonant with members and employers should shape the branding and communications – visuals, language, tone and content.

*Customer-focus*

Across the pensions sector, communications with customers has increasingly moved to a more 'lifestyle' model. Large pension providers now tend to try and hold conversations with members that are more personalised, bite-sized, colourful, and pitched at particular topics which might resonate.

For example, newsletters might now lead with messages like 'Dear Jane, here are top six ways to save tax' rather than just 'access your annual statement.' Some providers offer personalised videos which embed your name and financial information from the pension calculator in a simple 60-second visual presentation. Discussion about expectations for retirement involve not just the likely sum of a pension but talk about quality of life, personal priorities, and other 'softer' topics.

If a similar approach is favoured at ESPF it would shape both the tone, form and content of communication, positioning the fund as a 'friend', suggesting more investment in video or 'face to face' webinars with customers and perhaps lending itself to briefer but more frequent contact with stakeholders, rather than biannaul or annual updates alone.

Pension funds cannot give financial advice and must be rigorous about the information they present – but this need not be a block to further developing the brand towards one which feels a little more informal and customer-focussed.

Other thoughts on the current brand is that it incorporates a slightly tired and bland visual style which suggests the 'corporate brochure' (e.g. images of stacks of coins or growing plants) and a relatively muted colour palette (greens tend to be thought of as cool, measured and organic rather than warm and energetic). However, this is largely subjective and no approaches to branding are automatically right or wrong.

To fully refresh the brand, a sample or focus group of active members, pensioners and employers would ideally be consulted to help develop this.

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Once the fund has a clear strategy in mind for its brand this should inform the communications 'building-blocks' of tone, visual-style and content mix. This would probably include: colours, logo, imagery and typography; writing style and layout, emphasis on dynamic content (video and online chats/webinars) and levels of personalisation.

There are specialist brand consultancies and agencies who will conduct the entire process for an organisation though the costs can be high. As a lower cost option, a communications manager working with a designer can implement brand changes, although they may not be specialists in the field and the workload is still considerable.

> Recommendation: Set a process and timescale for creating and implementing a new brand and allocate resources accordingly.

## Website

https://www.eastsussexpensionfund.org/

The site is hosted on a secure domain which is important to build trust with users as well as improve your search engine rating. The domain name is excellent as it reflects the exact name of the organisation. However, a UK-based organisation would normally have a .org.uk address, a .org address normally indicates a US or a world-wide organisation. If there are plans to relaunch the website that could be a golden opportunity to switch to a .org.uk address but it's arguable whether it's worthwhile changing otherwise, especially if there are lots of print materials with the current address.

Design-wise, the site is responsive (resizing correctly for different screen sizes like mobile & tablet) though the look and feel are dated. According to the Wayback When internet archive the homepage looks exactly the same as it did in Dec 2018.
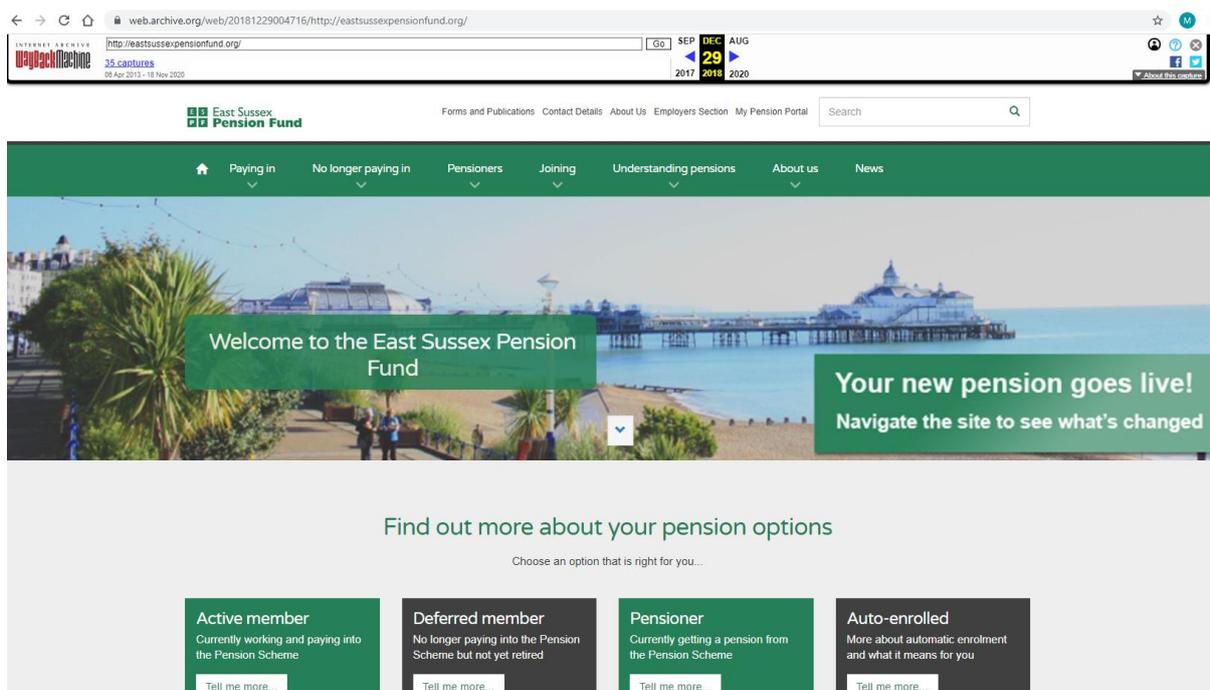


*East Sussex Pension Fund website December 2018*

The images on the site look very much like stock photography and don't add much value to the site. In particular, generic 'financial' images can make the site look like thousands of others in the same field.

*Accessibility*

Since the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018act came into force last September public sector websites open to the public must meet accessibility standards. This means online public services are accessible to all, including disabled people and access technology users. The pension site has been audited for accessibility using the SortSite accessibility audit tool & there were over 100 high priority issues reported falling into three main types. Some errors are related to the templates used so are reported multiple times.

1. HTML used in the templates - pages are not structured correctly, there are hidden Aria elements, the page language is unidentified & tables headers are not coded for accessibility. & others These will require development to fix.
2. Images – webpage images without alternative text or with blank alternative text, images in PDFs without alternative text, images with the filename as the alternative text. Most can be fixed without development by whoever updates the website.
3. Use of inaccessible PDFs. PDFs cause particular accessibility issues especially when used in forms. Depending on the content of the PDFs, converting to an online form or HTML webpage is the preferred solution. Otherwise PDFs can be tagged to make them more accessible but that's not ideal for users & is relatively complex to accomplish.

*Analytics (Jan 2020-Dec 2020 – visitor behaviour)*

There were 9,252 unique visitors to the website in 2020, with most activity in May & traffic growing increasing by c10% over the year. About 2/3$^{rd}$ of the site traffic comes from desktop computers as opposed to mobiles or tablets. Normally this suggests that users are older and/or office/home based and they're not checking the site on the move but current pandemic has changed user behaviour and this may simply reflect that many people now work from home on laptops. Most visitors to the site come from the UK but there are also visitors from more exotic places like Beijing and Karnataka, reflecting that ES pensioners may not settle in the UK.

There are 16k page views per year with 13k unique page views – users are typically viewing one page only and the average length of a visit is about a minute. The site bounce rate is 76% - this means that ¾ of the people who visit the site 'bounce' off i.e. view one page & leave the site. While that could indicate a positive visit where the user gets the information they need quickly and leave the site happy, the other stats suggest otherwise. The vast majority of visitors only view the homepage & there is a 74% exit rate (people leaving the site after looking at the homepage). Taken all together, this suggests a complete lack of user engagement with the content.

*Content*
In over a year nothing has been added or changed on the homepage to tempt a user to explore the site or alert them that new information has been added. This will discourage repeat visitors including search engine bots, which can affect findability online.

The website should give much greater prominence to My Portal as this is mainly where the fund wants to encourage members and pensioners. Rather than having the portal as just one of the navigation links, it could be an eye-catching box on the homepage and all other top-level pages. Although it's on a separate domain. (.gov.uk), provided the portal pages also offer a link back to the pension site it should be relatively simple to move between the two.

> Recommendation: Make links to My Pension portal much more prominent on the website, on all main pages. Site content should make it clearer what tasks can be accomplished on the My Pension portal and link to those tasks from the relevant section.

> Recommendation: Update the site regularly, for example with newsletters and other fresh content. If you don't know what content will tempt users to visit the site, conduct a survey or workshop with some users to find out their needs.

> Recommendation: Keep using other channels, like newsletters, to drive traffic to the portal and the website.

### Keywords and search

On a positive note, the keywords that bring users to the website are all on-point – strong keywords associated with East Sussex Pension Fund which also echo the domain name.

| Keyword |
|---------|
| 1. (not provided) |
| 2. east sussex pension fund |
| 3. (not set) |
| 4. east sussex pension |
| 5. east sussex pension scheme |
| 6. east sussex pensions |
| 7. www.eastsussexpensionfund.org |
| 8. east sussex pension fund website |
| 9. east sussex county council pension fund |
| 10. east sussex pensions website |

*Keywords for ESPF site*

Search isn't much used on the website – this suggest users find what they need on the homepage, browse to find it or are one of the 74% who simply leave the site after viewing the homepage. Visitors who come to the website via search engines like Google or Bing should land directly on the page that most meets their needs (i.e. not the homepage) so there are lower bounce rates on these visits.

The site has a clear information architecture (IA) based on users' current pension status which seems a sensible way to categorise content but the only way you can be truly confident that the navigation is effective is to ask your users. A good IA is created first by defining the site aims and then by doing a card sort of all the proposed site content.
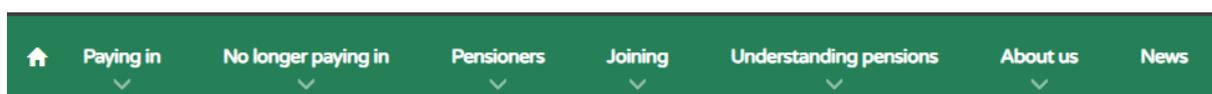


Exploring the first section 'Paying in' we see content written as if it's the last century & we need to explain how to use websites. For any competent web browser, the section below is completely redundant and actively interferes with them completing their task quickly.

## Welcome to the section of the site for members who are currently paying in to the Pension Scheme.

Whether you've just joined or you are about to retire you can find out all about your pension scheme here. You can move around this part of the site by clicking the pages listed on the right.

Other useful links appear at the bottom of this page as well as any forms or documents that might be helpful. These links change on each page so they are relevant to the content you are reading.

Section introduction - what function does this content perform?

It's most likely that this text was added because the template demands it, but that's not a good enough reason for adding content.

*Tasks*

This is mainly an information site but there are some forms that users can download to complete a task. Unfortunately, these events aren't tracked in Google Analytics so we don't know how popular they are.

> Recommendation: Track events like file downloads in Google Analytics. Better still, convert them to forms that users can fill in online. This is quicker, cheaper and more effective than using paper-based forms.

> Recommendation:  Find out what most popular tasks on the website are (these could be to find information or to complete a task like filling in a form) – put these tasks clearly on the homepage in order of popularity.

## Digital newsletters and emails

Current newsletters show considerable effort has gone into making them succinct and eye-catching. Topics are broken down into short, digestible chunks and the language used is admirably plain and simple.

Evidence that this works comes from the survey of employers; most employers who responded said they found their newsletter helpful (either 'very' or 'somewhat').

# Pension News

Autumn 2020



**An update for Members of the Local Government Pension Scheme (LGPS)**

Dear Colleague,
We are pleased to publish the latest edition of our Members Newsletter, which is produced to keep you updated on changes in the Local Government Pension Scheme (LGPS) and other useful information.

## COVID-19 Update

With the COVID-19 (Coronavirus) outbreak creating a fast moving and uncertain situation affecting us all, personally and professionally, we wanted to set out our arrangements for delivering our services to you.

Orbis Pensions remains operational and our aim is to ensure we can maintain vital services during this time. For current information regarding our services, and for other queries you may have regarding how this outbreak may affect your pension, please visit: **www.eastsussexpensionfund.org**

## 'Pension Made Simple' Videos

Would you like to know more about your pension?

The LGPS member website has recently uploaded 7 videos to explain various pension topics.

These videos are short, simple and packed with



*Autumn 2020 Active Employee Newsletter*

However, the branding of the newsletters is potentially confusing as several overlapping organisational identities are in play: Orbis, ESPF, LGPS and individual local authorities. A reader is likely to be confused about who is communicating with them and on whose behalf. Establishing a clear, single brand (as outlined above in the section on branding) would have a particularly clear benefit when applied to newsletters.

Newsletters are currently in pdf format, and links to these pdfs are shared by email.  There is a strong case for using a newsletter software system to replace the pdf format. This would have several advantages:

- It allows you to drop the designed content directly into a branded email template – no need to follow a link to a pdf
- It enables more direct engagement metrics – seeing how many people open the email, click on links, or unsubscribe
- It makes it easy to segment members in your database for specific messages and build sub-groups  – for example, if you wanted to send a specific message to members aged 45 or over, or contact people who've previously signed up for events or webinars. It could also make it easier to spread the release of large-scale updates over several days to help manage spikes in calls to the helpdesk.
- It makes it simple to put all email communications into a consistent branded template. One-off emails to employers could use the same format as regular newsletters, helping to tie all pension communications together in peoples' minds.

Newsletter software can also generate a pdf version of newsletters to send hard copies to people who still rely on print.

> Recommendation: Buy an email newsletter tool to use as the primary means of sharing news with different audiences, tracking engagement and giving a consistent look and feel to messages for stakeholders.

## Letters and printed publications

Paper copies of the annual benefit statement and newsletters are sent out to people who have not supplied an email and/or registered for the self-service portal.

Hard-copy leaflets and guides are also produced to distribute at pension workshops/member events when they're requested by employers though these have been paused during the pandemic.

## Communications content mix

An audit of a year's activity (2020)

| | | |
|---|---|---|
| Newsletters | 8 | *Pensioners annual*<br>*Deferred – annual*<br>*Active – biannual*<br>*Employers - quarterly* |
| Emails to employers | Four *(since September)* | *Records for earlier contacts in 2020 not immediately available* |
| Letters/direct mail | 8 | *Assuming paper versions of email newsletter as above* |
| Video | 2 (in-house) | *Voice-over-slides video explainer on annual benefit statement.*<br>*Voice-over-screenshots video on registering for My Portal.*<br>*Also LGPS explainer videos linked from newsletters though are not on website* |
| Media releases | 0 | *Website updated with Storebrand announcement.* |
| Social media | 0 | |
| Website updates | 6 | *'Be aware of pension scams' - December*<br>*Storebrand announcement – December*<br>*Annual benefit statement - December*<br>*Covid update – May*<br>*Covid update – April* |
| Webinars/online forums | 1 | *Employers' forum online* |

Communication is almost entirely in text formats, though this is spread across emails, newsletters and website updates. There is little or no direct use of video, graphics, slides, audio or webinars. The video content ('Pensions made simple') produced by LGPS is included in newsletters but not embedded in the website.

Plain text is a natural choice when emailing members and pensioners is the main means of communication and it's repeatable – the same item can easily be shared between emails, newsletters and on the website.  However, adding more visual forms of communication to the mix might help to

- Break up the wall of text and make communication more colourful
- Explain difficult or technical concepts
- Establish a friendlier and slightly less formal tone
- Offer an alternative to people who find reading online less easy

Video technology also allows 'two-way' communication, like webinars where people can join a conversation and have their questions answered. Finding effective ways of using these might not just achieve the four advantages set out above but could also help reduce some of the traffic to the helpdesk. For example, members could be invited on a first-come, first-served basis to book places at online help sessions where they can hear fund updates and ask questions. These could be targeted at different parts of the audience – new starters, people in their mid-40s, those nearing statutory pension age. Sessions could also be offered to individual employers and tailored to their priorities.

More content which takes a 'lifestyle' approach to pensions issues, such as focussing on well-being, general financial health or life-planning, should be explored – as mentioned in the discussion on brand. This approach is already widespread with commercial pension providers and may be suitable for ESPF.

> Recommendation: consider drawing up a content strategy to outline the types and balance of content likely to be effective and a content plan to plan and sequence messages, updates and events across the year. Pilot more 'lifestyle' oriented content and track its popularity.

## Content effectiveness

Newsletters and other direct communications to members appear to be generally clear and well-written – aiming for plain, non-technical language, divided into shorter and easy-to-digest sentences and using headings and sections to lay content out comprehensibly.

This impression is confirmed by running some communications to members through readability software.

**Readability Consensus**
Based on (7) readability formulas, we have scored your text:

**Grade Level:** 9
**Reading Level:** standard / average.
**Reader's Age:** 13-15 yrs. old (Eighth and Ninth graders)

*Guide to annual benefit statement*
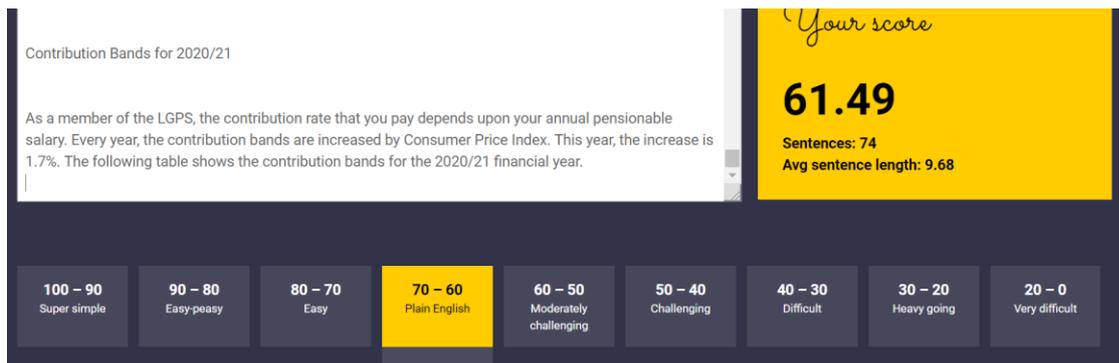
*Newsletter to active employees*

Attention could be paid to ensure this applies to all levels of fund communication. Direct communication with pension members strives for clear and plain English, but this is less in evidence when it comes to annual reports or policy statements. For example, the introduction to the annual report from moves from the 'Plain English' rating of newsletters to 'Challenging'.
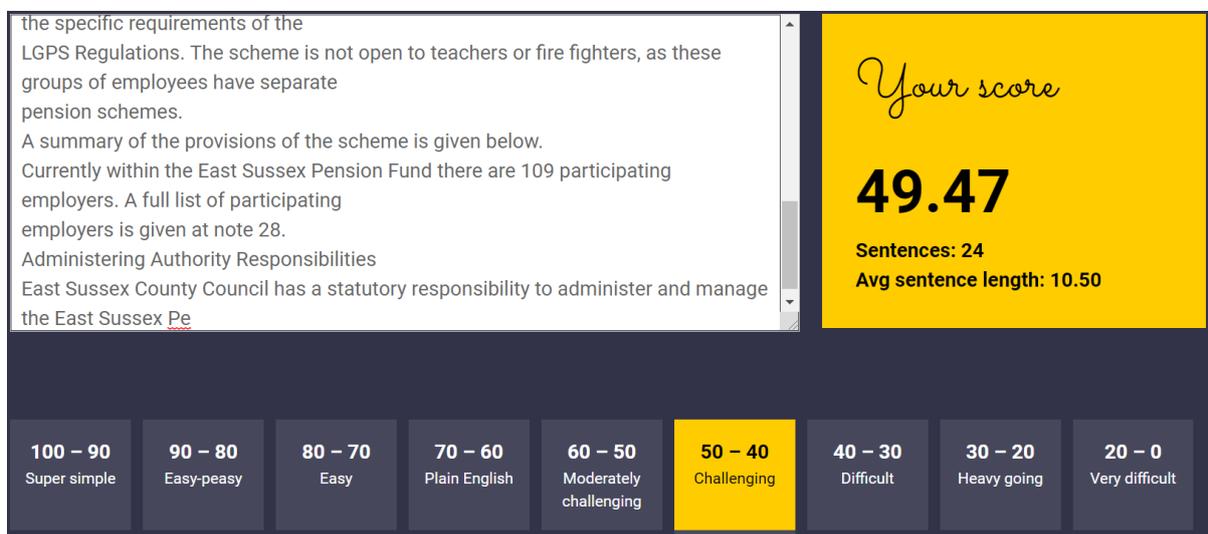


*Introduction to annual report*

These are obviously more technical documents but would still benefit from a tighter focus on plain English and readability; the assumption must be that any member might want to look at the annual report. Planning documents to give them a narrative structure and relegating technical detail to appendices or sub-sections helps make them readable, rather than just placeholders to fill a legal requirement. Thoughtful use of graphics and illustrations, and design which makes complex pages more eye-catching and digestible, will also help.

Consistency is also an issue to consider. As well as the potential confusion from overlapping brands, fund communications sometimes uses different terms or language for the same thing. For instance, the website uses 'active member' where newsletters sometimes use 'active employee' to refer to the same group. It may seem like a minor distinction, but effective communication often relies on using repeated terminology, messages and patterns to crystallise understanding, especially in an area like pensions where there may be long gaps between an individual's engagement with your communications.

Repeating effective content across all platforms (an approach known as COPE – 'Create Once, Publish Everywhere') will help with consistency. If you have an eye-catching infographic, case study or video, use it in newsletters, on the website and link to it in press releases.

> Recommendation: Involve designers and writers in planning and producing all major documents, such as the annual report, so that they can help structure them and use plain English and graphics to make them as accessible as possible to a general reader.

## News and media-handling

Over the past 24 months, the press office at ESCC has dealt with a total of 18 media enquiries relating to the East Sussex Pension Fund and captured more than 70 pieces of media coverage.

While some enquiries have come from specialist media and relate to details of investment and fund management, the vast majority were made by reporters from local or regional media organisations and were in direct response to action taken by Divest East Sussex.

Articles appearing in the local and regional media focus on the actions of Divest East Sussex, with a comment provided by the press office or a quote taken from a councillor during a meeting tagged at the end of the article. As a result, the articles are largely negative. The way the media has handled the story can be attributed to a number of factors: an increase in the level of interest in environmental issues, the emotive nature of the subject, the newsworthiness of the protests and the fact that Divest East Sussex provide ready-to-print press releases.

While it would be extremely difficult to change the focus of these articles, the fund should consider a more proactive media stance; especially announcing decisions and reporting discussions by the pension fund committee relating to environmental issues and social factors. This could lead to more balanced articles appearing in the local media and regional media and will help establish a more positive narrative about environmental and social responsibility.

> Recommendation: Actively publicise action and decisions by the committee, especially when they involve significant developments in the fund's ESG policy.

## Social media

The fund does not have any social media accounts and this is almost certainly not a priority area.

Unless there is demand from pensioners or employers to contact the fund by social media or see updates, keeping contact through email and website should be sufficient given these touchpoints are relatively infrequent and predictable.

Creating social media accounts is more likely to build a 'machine' to be serviced and may act as a magnet for critics and provocateurs. A better use of resources would be to ensure the website is kept updated with clear and simple factual statements about the fund's areas of work. This would be a place to direct people for information if they use social media to pose questions or challenges to individuals or partners organisations connected with the fund.

Regular but routine monitoring of social media for mentions of ESPF, to help prepare for any emerging issues, would still be useful however.

## Handling controversy, campaigns, and questions

There's no evidence that most ESPF members or other stakeholders consider divestment from fossil fuel companies a pressing issue but board members, fund staff and the County Council must regularly respond to criticisms and questions from vociferous campaigners on this topic.

The volume of queries received by the fund (and by East Sussex County Council members and officers) suggest that ESPF could benefit from establishing a formal and transparent correspondence policy to set out how it will manage responses to the enquiries within its limited resources.

To support this approach, the fund's communications should publish online, and regularly update, a short and plain English summary of its activity and policy regarding fossil fuel investments. This position statement would:

- provide a succinct explanation of the fund's ESG policy in general and on fossil fuel investment in particular
- clearly show the long-term movement away from fossil fuel investment
- recognise the shades of opinion on these issues but emphasise the duties to pensioners and members which the fund must fulfil
- Provide a single factual source to which people can be referred, as an alternative to answering multiple, similar questions

Questioners should be referred to this online source with a polite explanation that it sets out the fund's position, developed through its transparent governance system, and that it has been developed as the best way to answer most public queries given limits on staff resources.

The statement could also include simple graphics which illustrate the small and shrinking proportion of investment in fossil fuel firms and should link on to the full Statement of Responsible Investment Principles.

This clear, simple narrative about fossil fuels should be embedded throughout the fund's communications, including in the regular updates for members and employers. It's important to proactively show the progress that's being made on the issue to counter any perception that it's a simple binary decision for the fund.

> Recommendation: Agree and publish a clear correspondence policy which set out how the fund will respond to public queries, recognising its limited resources.

Recommendation: Capture a clear and updated narrative about the fund's policy on fossil fuels and other ethical investment issues which is prominent in all communications. Refer campaigners as well as members and employers to factual sources of information and keep these regularly updated to reflect the progress made.

## Evaluation and analytics

The existing communications strategy says that a key aim is to:

- *Regularly evaluate the effectiveness of communications with members and employers and shape future communications appropriately*

Some measurement of communications success already exists - including website analytics and a survey of employers – but it appears much more could be done to establish systematic evaluation of communications.

In particular, surveys of members (or a sample focus group of members), should help drive brand development, identify key tasks for the website and portal, inform the type of content that members would find useful and guide frequency and format of communications. The communications strategy recommends an annual survey of members; this should be a priority.

Using an email newsletter platform will also offer valuable metrics on member and employer engagement with different topics and types of content and what tactics are successful in driving take-up of the self-service portal.

Data from the helpdesk should be cross-referenced to communications metrics to guide help identify particular friction in online tasks and to steer timing and frequency of newsletters and other communications.

Recommendation: Design and run a member survey within the first weeks of the new fund administration to help understand communications need and effect.

Recommendation: Identify a small number of communication metrics (probably no more than three initially) for regular evaluation.

## Part Two - A structure for future communication

It's clear the workload and breadth of communications and engagement work for the fund will be considerable, especially in the first year of operating independently. Making the right choices for the fund now, in strategic areas like branding and investment, can provide a base for good communications to develop over years to come.

Set out here is a suggested sequence of communications priorities for the next 12 months. This is followed by three possible models for providing the communications needed (with the very approximate costs involved).

### Priorities

| Immediate action |
| --- |
| Draft, agree and publish a single sentence which captures the fund's purpose. |
| Draft, agree and publish short position statements on key areas of business, including policy and action on fossil fuel investment. |
| Scope and resource a brand review |
| Procure a newsletter software as the main tool for all updates to members, employers and other stakeholders *(ensuring compatibility with Altair and data security)* |
| Design and initiate a survey of members |
| Prepare 'launch' communication:<br><br>• First post-April newsletters to announce the fund's new arrangements.<br>• Redesign of portal (already in hand).<br>• Signpost correspondence policy in conjunction with online positioning statements<br>• Make essential website updates |
| **Within six months** |
| Carry out brand review |
| Analyse member survey |
| Agree an initial selection of communications metrics and targets *(align with helpdesk data)* |
| Develop forward content plan (frequency, formats and types of content) |
| **Within 12 months** |
| Implement revised brand (including redevelopment and updates of website and portal, updates to newsletters and publications) |
| Trial and evaluate newer formats of communication (e.g. 'lifestyle' content in newsletters, video webinars for members) |
| Carry out employer survey |
| Evaluate communications metrics and adjust communications activity accordingly. |

## Costs and resources

These are indicative costs only and are not actual quotes so should be treated with caution, but they may help in considering investment in communications work.

| Brand review and development | A consultant or agency is likely to charge anything between **£15,000 and £50,000+** for a comprehensive brand review and development and design costs could push this higher.<br><br>A DIY option, where existing staff commission a designer and a content specialist/copywriter is likely to be a less expensive, but more home-made, choice. Allowing 15 hours of time for each, this might cost around **£2,000** (does not include the time of ESPF staff) |
|---|---|
| Cost of newsletter software | Annual cost likely to range between **£6,500** and up to **£20,000+** depending on provider and features chosen. |
| Website development | Highly variable depending on the supplier and the level of development required, but revising navigation, implementing a new brand and other recommended development might be expected to cost between **£5,000** and **£10,000**. |
| Copywriting | If a specialist pensions copywriter is needed, for example to create 'lifestyle' pensions content and material, they're likely to cost **£400 a day.** |
| Freelance design | About **£250** a day |

Other communication costs that might be incurred include survey software, web hosting, maintenance and domain registration, printing costs, direct mail and video production.

## Staffing models

Three possible models for delivery of communications are suggested.

### Option A – permanent communications manager

Recruit a permanent member of staff to manage communications for the fund. This would be a communications all-rounder, capable of writing, editing, sending newsletters, creating communications and content plans, updating the website, making simple videos and having the experience to commission more specialists services such as brand, design and complex digital content (advanced graphics, animation or video).

The FTE cost for this post would be about £45,000 (with on-costs). It might be possible, if challenging, to manage the workload at 0.75 FTE - £34,000.

## Option B – existing ESPF staff commission all communications need

All communications work is bought in as required. Existing staff would commission web development but update the site themselves. They'd distribute newsletters and other updates to stakeholders, buying in copywriting and design services as needed.

This would keep staff cost down but suggest the need for a large and more flexible annual communication budget to meet the fund's needs.

## Option C – transformational communications manager, reverting to steady-state communications

A temporary communications manager is recruited to oversee the first year of the fund's new communications set up. This person could take day-to-day responsibility for the new communications set-up, commissioning necessary branding, re-design and web development, implementing surveys and establishing narratives, communications strategy and content plans. The FTE cost would again be around £45,000. This would need to be a full-time role.

The post would cease after a year and existing pension fund staff would take over delivery of the communications system and templates left in place. There would be some need to commission further communications work at times, but this would be less frequent if a strong footing and clear plan was in position after the initial year.

*29 January 2021*