

## **Communications Policy Statement East Sussex Pension Fund**

1. The Communications Policy Statement covers the policy of East Sussex County Council in its role as the administering authority for the East Sussex Pension Fund as required under Regulation 61 of the Local Government Pension Scheme (Administration) Regulations 2013. Communication is at the heart of everything East Sussex Pension Fund does and is key to us achieving our administrative objectives.
2. There is now a greater awareness of pensions amongst the public than ever before resulting in an increased demand for information and this demand means that as a LGPS Fund we need to continue to be proactive in providing and delivering clear and timely communications.
3. 2015 saw changes for both the Fund and Scheme Employers as the LGPS came under the oversight of The Pensions Regulator. This change has meant that our Communications Policy regarding Scheme Employers became even more crucial to the effective administration of the LGPS, towards our joint role in maintaining the flow of accurate and timely information and ensuring compliance with The Pensions Regulator's Record Keeping Requirements.
4. 2015 also saw changes to the governance of LGPS Fund with the introduction of Local Pension Boards and the formal establishment of a Pension Committee.
5. All local government pension schemes are required to publish a statement on the approach of the Pension Fund to communication with members, prospective members and employing authorities.
6. The East Sussex Pension Fund liaises with over 109 employers and approximately 41,000 active and retired members.

### **Day to Day Responsibilities**

7. The officer responsibility for the East Sussex Pension Fund rests with the Chief Finance Officer for East Sussex County Council (with the exception of the employees' benefits service). The Chief Finance Officer and officers of the Pension Fund, who are part of Orbis (which is the shared service between East Sussex County Council and Surrey County Council), report to the Pension Committee and Pension Board. The day to day responsibility for pension governance, strategies, investment management and communication with employers rests with the Head of Accounts and Pensions, who reports directly to the Chief Finance Officer.
8. Business Operations undertake the day to day functions associated with the administration of the LGPS for employees, with the day to day responsibility resting with the Head of Business Operations, who reports to the Chief Operating Officer of East Sussex County Council (all of whom form part of Orbis)

## **Overview of the Approach to Communication.**

9. The East Sussex Pension Fund communicates with a wide variety of stakeholders, each with slightly different needs.

10. The Pension Fund maintains a dedicated web-page on the County Council's website and in addition a dedicated member's website known as the East Sussex Pension Fund website (ESPF). Regular communications are issued by the East Sussex Pension Fund to both employers and members of the Fund via periodic newsletters, E-mail Alerts, meetings and statements. Newsletters are communicated electronically to all employers who are encouraged to disseminate to all relevant staff.

11. The Pension Fund also accepts electronic communication, e.g. by email, as well as the more traditional telephone and paper-based communications.

12. In addition to regular electronic or paper based updates, there is an annual general meeting for all Employers in the scheme hosted by the Administering Authority.

13. A dedicated customer telephone number, to handle the majority of queries, is maintained by the Business Operations - Orbis.

14. We recognise that individuals may have specific needs in relation to formats or language. We can, and do, respond to this on a request basis. Demand is not high enough, however, to incur the cost of automatically preparing and maintaining such alternative formats etc.

## **Communication with Deferred and Active Members.**

15. The core communication objective is that all active members, within all relevant employer organisations, are kept up to date with any changes in scheme benefits, can access scheme advice and have an awareness of the overall performance of the Investment Fund.

16. This is achieved by the following:

- Dedicated web-page on the County Council's and East Sussex Pension Fund web-site;
- Regular electronic or paper-based newsletters. For other employer bodies, this is dispatched to a lead contact (usually within the HR and Payroll function) with a request that it is shared with all relevant staff;
- Annual benefit statement posted to the home address;
- Notification of a dedicated customer query telephone line maintained by the Business Operations – Orbis;
- Maintenance and availability of Scheme Booklet;
- Advice on request about such matters as estimated retirement benefits etc.

## **Communication with Pensioners**

17. The core communication objective is to ensure that pensioners are aware of the general performance of the fund (recognising this will not impact on pensions in payment) and any specific factors that do affect pensions in payment (e.g. annual pensions increase).

18. This is achieved by the following:

- Notification of pension increase posted to the home address;
- Clear detail on customer query contact routes on payslips posted to the home address;
- Access to the websites;
- Access to periodic road shows (advertised in payslips posted to the home address).

## **Communication with Prospective Members and their Employing Authorities.**

19. The core communication objective is to ensure that all employee joiners, to all employers in the East Sussex Pension Fund, are made aware of the benefits of becoming a member of the Local Government Pension Scheme – and are assisted in the subsequent joining arrangements.

20. This is achieved by the following:

- Joiner information via all relevant employers, made available to all employee joiners;
- Access to customer query contact details;
- Access to the dedicated web-page and sites;
- Newsletters;
- Receipt of all information and opportunities afforded to existing active members as set out above.

## **Communication with all Relevant Employer Organisations**

21. The core policy communication objective is to ensure that all employers are aware of the performance of the Investment Fund (given its impact on employer contribution rates); any scheme changes impacting on the employer's HR or workforce planning; any key discretions to be exercised by the individual employer; advice on the future valuation outlook; and advice and agreement on key frequent and annual data and financial transaction flows between the administering authority and individual employers. All this is in addition to the general pensions awareness employers will wish to maintain as a 'good employer'.

22. This is achieved by the following:

- Regular employee newsletters shared with all employers;
- Specific communications on scheme changes for employers;
- Quarterly summary reports to employers on the Investment Fund through ESFOA;

- Annual general meeting with all employers dealing with investment performance, actuarial insights and any scheme changes;
- Routine sharing of employers' discretions exercised by ESCC as a preformed to enable other employers to consider their own approach.
- Direct access to the Actuary to the fund if required;
- Periodic road shows/seminars with individual groups of employers;
- Specific employer guide, both paper based and maintained on the websites;
- Briefings for groups of senior managers as requested including sharing of key committee papers produced;
- Briefings and sharing of information with union representatives.

### **Communication with the Pension Committee and the Pension Board**

23. The core communication objective is to ensure all elected members are aware of the benefits of joining the LGPS to ensure the nominated members, in their committee roles and members of the Pension Board, are kept up to date on key investment or scheme issues.
24. This is achieved by the following:
- Providing relevant information on current issues at Pension Committee and Pension Board meetings.
  - Periodic electronic briefing notes for ESCC members on key issues, but shared with all employers to share with the elected members or equivalent;
  - Detailed periodic reports to the appropriate committee to agree, for example, official responses to consultation requests. Again, these are shared with all employees to provide some pro forma guidance.
  - Detailed and dedicated training for all Members of both the Pension Committee and Pension Board.

### **Communication between the Local Pension Board, Scheme Members and Employers**

25 The Local Pension Board was established in April 2015 to assist the Committee in securing compliance with the scheme regulations and the effective and efficient governance and administration of the LGPS. It is made up of 3 scheme members' representatives and 3 scheme employers' representatives along with a non-voting independent chairman.

- 26 Pension Fund officers will provide professional support to the Pension Board, ensuring regular communication with members and employers through –
- Opportunity for members of the public to attend the Board meeting and receive papers, which will be made public in accordance with the Access to Information Rules in East Sussex County Council's Constitution.
  - Up-to-date information will be posted on the East Sussex Pension Fund website with full terms of reference and policies of the Pension Board and how it operates.
  - Officers ensuring that draft reports on investment, governance and administration matters are available for consideration.

## **Communication with other Key Stakeholders**

27. These vary from the Administering Authority Fund's Actuary to the Inland Revenue and Orbis. The needs are different. The Administering Authority takes upon itself the responsibility to ensure the most effective and efficient communication processes with these other stakeholders to ensure proper and necessary business is conducted efficiently and effectively. In addition, the Administering Authority will seek to ensure proper and professional response to media queries.

## **Communication with Council Tax Payers**

28. The core communication objective is to ensure that the Council Tax Payer are aware of the pension cost issues as part of the whole range of cost and service dynamics that the Council has to deal with. This is a matter for each individual council.

29. For ESCC, this is achieved by ensuring the pensions cost issues are a transparent part of the Council's wider approach to Reconciling Policy, Performance and Resources.

## **Conclusions and Performance Management**

30. ESCC, as Administering Authority, takes its responsibility on behalf of all employees and employers in the scheme very seriously. Communication is vital with all key stakeholders. This is not just to ensure relative needs are recognised and met but to ensure a continued high confidence in the administration of the scheme in East Sussex.

31. Each communication channel will have an obvious performance measure in terms of inputs (e.g. annual pensions meetings are held annually or telephone calls are answered within 30 seconds or post enquiries are responded to within seven days). Most importantly, it is necessary to assess the quality of the communication.

## **Key contacts**

32. As follows:

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