

**Report to:** **Pension Committee**

**Date of meeting:** **1 March 2021**

**By:** **Chief Financial Officer**

**Title:** **Communications Review Report**

**Purpose:** **This report informs the Pension Committee on the outcomes of the Communications review completed by the Head of Communications and Marketing**

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## **RECOMMENDATION**

**The Pension Committee is recommended to:**

- 1) Consider the recommendations laid out in the Communications Review**
  - 2) Note the feedback from Pension Board in relation to this paper;**
  - 3) Approve the recruitment of a designated Pension Fund Communications Manager;**
  - 4) Approve the creation of a Correspondence Policy; and**
  - 5) Endorse the establishment of a Pension Board Communications Working Group**
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### **1. Background**

1.1 In November 2020 the East Sussex Pension Fund (ESPF or the Fund) instructed the East Sussex County Council's Head of Communications and Marketing, to carry out a detailed review of the Fund's Communications. The review was commissioned to advise on recommendations in relation to how the Fund communicates with its members, employers and outside interested parties. The scope of the review included how to better engage, how to be clear and consistent and how may the Fund go about implementing these recommendations. A scope for this piece of work was included in the November Pension Board and Pension Committee papers.

### **2. Supporting information**

2.1 The detailed results and recommendations of the Communications review can be found in **Appendix 1**.

2.2 The report outlines a number of recommendations as result of evidence collected from the Fund which have been summarised in the table 1 below.

**Table 1**

<b>Topic</b>	<b>Recommendation</b>
Strategic Objectives and messaging	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,

	<p>Environmental, Social and Governance (ESG), offer to employers. Make these easy to find</p>
Branding	<p>Set a process and timescale for creating and implementing a new brand and allocate resources accordingly.</p>
Website	<p>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.</p> <p>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.</p> <p>Keep using other channels, like newsletters, to drive traffic to the portal and the website.</p> <p>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.</p> <p>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.</p>
Digital newsletter	<p>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.</p>
Content of messaging	<p>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.</p> <p>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.</p>
News and media handling	<p>Actively publicise action and decisions by the committee, especially when they involve significant developments in the Fund's ESG policy.</p> <p>Agree and publish a clear correspondence policy which set out how the fund will respond to public queries, recognising its limited resources.</p> <p>Capture a clear and updated narrative about the Fund's policy on fossil fuels and other ethical investment issues which is prominent</p>

	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.
Engagement	<p>Design and run a member survey within the first weeks of the new fund administration to help understand communications need and effect.</p> <p>Identify a small number of communication metrics (probably no more than three initially) for regular evaluation.</p>

2.3 In addition to recommendations above, the review set out on page 17 of **Appendix 1** a timeline for the delivery of the key priorities; this is duplicated in table 2 below:

**Table 2 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 ( <i>ensuring compatibility with Altair and data security</i> )
Design and initiate a survey of members
Prepare 'launch' communication: <ul style="list-style-type: none"> <li>• First post-April newsletters to announce the fund's new arrangements.</li> <li>• Redesign of portal (already in hand).</li> <li>• Signpost correspondence policy in conjunction with online positioning statements</li> <li>• Make essential website updates</li> </ul>
Within six months
Carry out brand review
Analyse member survey
Agree an initial selection of communications metrics and targets ( <i>align with helpdesk data</i> )
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.

## **Correspondence Policy**

2.4 One of the areas raised within the Communications review on pages 14 and 15 of Appendix 1 is the scale and impact of questions and challenges to the Fund and how these are handled. The report only touches on some of the specific methods of correspondence and communications relating to news, media, controversy campaigns and questions the Fund receives.

2.5 There are number of routes in which members of the Fund, employers, residents and other interested parties engage with the Fund and this is not currently coordinated.

2.6 Within appendix 1 it is highlighted that in the past 24 months the press office at East Sussex County Council has dealt with 18 media enquiries relating to the Fund and captured more than 70 pieces of media coverage.

2.7 At the last four Full Council meetings, covering the period July 2020 to February 2021, there were approximately 700 questions from members of the public relating to questions on climate change and human rights issues. Many of the questions are repeats of the same question. However, in a number of cases the questions were very detailed asking specific questions about strategy or opinions, in some cases asking for ethical stances. Due to the parameters set around the process of Full Council questions and the technical nature of some of the questions it is difficult for the Fund to fully address some of the concerns of ESPF members. This is due to the impact on resources and the very short turnaround of 3.5 days to publish responses as the Fund will often need to liaise with external fund managers and other sources to fully respond. It is important that the Fund properly answers the question that has been raised.

2.8 There are a number of websites that automatically send emails to East Sussex Councillors if someone enters their name in response to information about the Pension Fund. Often these websites are outdated with their information about the Fund and raise undue concern by Pension Fund members. In many cases there is no method for the Fund to respond directly to the member as emails are sent from generic system emails. Officers were passed eight from one site within two months where it is unknown if the sender receives the response as there are no direct contact details. The Fund also received four from a secondary site over the Christmas period, which does provide direct email addresses to respond. Often the Fund receives no comment or follow up questions to these responses.

2.9 In addition to the routes above, the Fund has received a small number of letters from employers within the Fund around investment activity; Freedom of Information (FOI) requests relating to investment positions in certain asset classes and sectors; engagement through social media directly with Councillors; emails directly to Councillors; and cards and postcards posted directly to Councillors' home addresses.

2.10 Due to varying sources of communications to the Fund there is currently no recording method of questions or correspondence policy to respond within certain timeframes. So, in line with the recommendation in the review, officers support the recommendation for a Correspondence Policy to be put in place for the Fund. It is important that response timeframes are achievable within the resources of the Fund, bearing in mind the workload of the Fund. In addition, persistent questions that have previously been answered or continual follow up questions need to be

managed effectively. The Correspondence Policy will cover the ways in which questions can be raised to the ESPF and how the Fund will respond.

2.11 In producing a Correspondence Policy, the Fund will need to consider the most effective point of contact, possibly through a designated email address, and ensure there is a resource to monitor, log and respond to all queries. The Fund will need to consider if this should and could fall within the helpdesk remit or other area of the Fund service provision.

## Potential costs and resources

2.12 The review suggests three alternative staffing models to implement the recommendations and provide effective communications throughout the Fund.

- Option A would be to recruit a permanent communications manager
- Option B existing officers commission all communications needed
- Option C recruit a temporary communications manager to oversee year one and existing staff take over delivery in future years.

2.13 Fund officers will recommend to Pension Committee that Option A is considered due to the significant amount of ongoing communications work required in the team and to ensure the Fund's communications are kept up to date once the first stage work is implemented.

2.14 In addition to staffing costs there will be other financial implications to enable the work to be completed within expected standard including some software and design costs. Estimates on various costs are include on page 19 of Appendix 1. Costs have not yet been built into the Pension Fund Budget while we await approval from Pension Committee.

## Communications Working Group

2.15 At the last meeting of the Pension Board on 15<sup>th</sup> February, the Board agreed to establish a Working Group to review and comment on draft communications produced by the Pensions Team in response to the Communication Review, including questionnaires to Fund Members, webpages, branding, newsletters, and any information to be sent to Fund Members. This will ensure that representatives of employers and employees of the Fund will have had the opportunity to review communications and have input into their development before they are published.

## 3. Conclusion and reasons for recommendation

3.1 The Pension Committee is asked to approve the implementation of recommendations within the communications review, including the recruitment of a Communications manager to lead on this project and ensure the fund continually provides members with an expected level of service through communications. The Committee is also asked to approve the creation of a Correspondence policy to ensure all correspondence is dealt with consistently and within an agreed standard. The Committee is advised to note the costs associated with this project are not built within the budget, if approved the budget will be revised next quarter.

3.2 The Committee is also recommended to endorse the Pension Board's Communications Working Group.

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