

Report to: Pension Committee

Date: 17 June 2022

By: Chief Finance Officer

Title: Communications Report

Purpose: To inform the Pension Committee of the 2022 Communication Strategy and activity since the previous meeting

RECOMMENDATION

The Pension Committee is recommended to:

- 1) Approve the Communication Strategy**
 - 2) Note the other areas of the report**
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1. Background

1.1 This report is brought to the Pension Committee to provide an update on communication tasks that directly affect the East Sussex Pension Fund (ESPF or the Fund).

1.2 Under the Local Government Pension Scheme (LGPS) Regulations, East Sussex County Council is required to maintain a pension fund for its employees and other 'scheduled bodies' as defined in the Regulations known as the East Sussex Pension Fund.

1.3 The Fund has a Communications Strategy which defines the main means of communication we provide for our key stakeholders. This includes making the best use of technology where appropriate, to provide quicker and more efficient communications for the Fund's stakeholders. The Fund will ensure that communication methods are accessible to all.

2. Newsletters Employer

2.1 An employer newsletter was issued in February 2022. This was designed in a new format and covered the following:

- Transfers - new rules to help with scams
- Valuation of the scheme – information regarding the forthcoming scheme valuation. This included a link to a Barnett Waddingham presentation which covered different valuation types and explained what the Fund must provide in order to carry out a funding valuation.
- McCloud judgement update
- i-Connect – making employers aware that we created some supplementary guidance for employers on specification requirements and data items that must be submitted via i-Connect
- Employer forum 2021 - feedback and links
- A reminder to employers about their responsibilities regarding contributions

- Member self-service – promoting awareness and the importance for employers to promote this feature to their employees
- TUPE transfers - admission process
- Employee contribution levels - 2022/23

2.2 A further employer newsletter is due to be sent in early June. This will be built on the ESPF website and will cover employer survey, employer Forum, iConnect, contributions, annual benefit statements, member self-service, ill health retirement process, valuation, auto re-enrolment, LGPS HR and payroll guides.

Active members

2.3 A newsletter for active members was issued on 13 April 2022. This was produced in a digitally focussed format with the email issued to members directing them to a webpage where the newsletter was cited. In addition, there were designed and text-only versions for members who preferred alternative formats. This newsletter focussed on the following areas:

- Member Self-Service – a system which provides 24-hour online access to your pension.
- Pension scams - Find out how to spot, avoid and report pension scams.
- Member survey coming soon – Are we getting things right?
- Lifetime allowance - a reminder to notify HMRC if lifetime allowance protection is lost.
- Contributions levels - From April 2022 employee contribution salary bandings will change.
- Top up your retirement savings – pay extra now to boost income in later life.
- Expression of wish – Looking after loved ones.
- New LGPS member website launched - new brand, new website.
- ESPF website – a great source of information for members of the LGPS.
- Glossary – ever been confused by pensions jargon...let us help.
- Privacy notice - Find out how we use your personal data.
- McCloud judgement – An update.
- Getting in touch - a reminder of how to contact us for support.

2.4 All newsletters now sit on the respective pages of website, promoted via web call outs/banners. They are also available via the Resources menu of the website. The active newsletter page on the website was easily our most visited page with 3,839 visits.

Pensioners

2.5 The Pensioner newsletter was issued in the second week of May 2022. This newsletter focussed on the following areas:

- Member Self-Service – a system which provides 24 hour online access to your pension.
- Pensioners survey – Are we getting things right?
- Pension pay dates – the dates you'll receive your pension for the 2022/23 scheme year.
- Annual adjustments to pensions in payment – information on cost of living increases.
- Tax queries – what to do if you have a tax query relating to your pension.
- Tax thresholds – the new tax thresholds that apply from the 2022/23 tax year
- Notifying the Fund about a death – dealing with bereavement.
- LGPS new website – new brand, new website.
- New ESPF website – a great source of information for members of the LGPS.

- Glossary – ever been confused by pensions jargon...let us help.
- Privacy notice - Find out how we use your personal data.
- McCloud judgement – An update.
- Getting in touch – A reminder of how to contact us for support.

3. Website

3.1 Over the last few months, a lot of work has been done to refine the content that sits on the website including:

- Home page – video content added, superfluous content removed, LGPS website promotion, glossary added, data protection content refined,
- LGPS Fund of the year – promotion via banner and sub-page detailing fund achievements
- Newsletter – active member newsletter now built as a web-enabled newsletter
- Resources – Documents now categorised, set out alphabetically, old information removed
- Surveys – Employer and active member survey promoted via respective webpages
- Investment – brand new content including the importance of investment, how do we invest, Access pool, responsible investment, stewardship code and asset allocation and performance. This content seeks to provide a good overview of the work the Fund had done with investment with more detail available if required.
- Member self-service – complete rewrite of this page which now includes a) A link directly to the portal, b) Registration instructions (with viewable/printable document), c) Forgotten user name and password instructions (with viewable/printable document), d) questions and answers.

3.2 The Fund are working with Hyman Robertson to build a website dashboard that will allow us to track website visits, most viewed pages, dwell time on pages, how visitors have ended up on the site, new visitors etc.

4. Surveys

4.1 Surveys have issued to both the employer and active members for 2022. The survey questions were reviewed and agreed by members of the Communications Working Group. These surveys ended in May and feedback will be compiled for a future meeting of the Communications Working Group and help set actions for teams across the Fund.

Employer

4.2 The employer survey ran from 7 April 2022 to 5 May 2022. Unfortunately, the response rate was low. Only 12 employers completed the survey. A full analysis of the results together with actions will now be collated.

Active member

4.3 The active member survey ran from 12 April 2022 to 10 May 2022. We had 1,316 members complete the survey. A report will be published on the website once the analysis has been fully completed and content (including actions) agreed.

5. 2022 Communications Strategy

5.1 The 2022 Communications Strategy has now been drafted and a copy is attached in Appendix 1. This has been reviewed and amended by Fund Officers and the Communications Working Group. The Pension Board were asked to note this strategy in advance Pension Committee approval.

5.2 Changes made to the Communications Strategy from the prior approved version include:

- The look and feel have been refreshed through a combination of brand and imagery.
- Wording has been simplified where appropriate.
- The aims and objectives of the communication elements of the Fund were refreshed.
- The measures set out to meet those aims and objectives have been refined.
- The paper now brings out the main types of communication we provide for members and employers early in the strategy.
- An appendix has been added that details all of the document types, how these are provided (electronically, paper etc) and an approval schedule for all communications we issue has been added to ensure we have adequate governance for the Fund.

6. Conclusion and reasons for recommendation

6.1 The Pension Committee is recommended to approve the Communications Strategy and note the work done in the period since the last meeting.

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