

Report to: Pension Board

Date: 15 November 2022

By: Chief Finance Officer

Title: Communications Report

Purpose: To inform the Board of communication activity delivered since the previous meeting

RECOMMENDATION

The Pension Board is recommended to note the report

1. Background

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

1.2 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

2.1. An employer newsletter was issued in early-October 2022. This was designed in a new format and published online. All newsletters now sit on the respective pages of website, promoted via web call outs/banners. Direct links to latest versions below.

Active: [Newsletter \(active members\) - April 2022 | East Sussex Pension Fund](#)

Pensioner: [Pensioner newsletter - April 2022 | East Sussex Pension Fund](#)

Employer: [Employer newsletter - October 2022 | East Sussex Pension Fund](#)

They are also available via the Forms and publications menu of the website.

3. Website

3.1 Work continues to refine the content and 'look and feel' of the website:

- Homepage – recent additions to the homepage include a banner reassuring member that their benefits are safe following the recent turmoil in the investment markets and a piece on the 'cost of living crisis' and how the LGPS can help
- Paying-in page – The page now includes Newsletters, Survey results, Guides (members asked for simple information in the survey results) and general information to support active members of the Fund.
- Pensioners page – similar enhancements to active members
- Employer page – content refined including promotion of newsletter, employer forum and updates made to iConnect and McCloud data collection

- Member self-service – Following negative feedback on registration, lost usernames/passwords there is now a new page to support members
- Investment – new versions of the [Q2/2022 ESG statement](#) and [Statement on Israel and the Occupied Territories](#) have been published.
- News - a news item has been published to advise stakeholders Fund is among a record number of signatories to a [Global Investor Statement](#) which urges global governments to radically step up their ambition on climate policy - the most ambitious global climate statement from investors to governments in history, as agreed by the Pension Committee in July 2022.

4. Forms

4.1 The Fund has recently updated all member and employer forms, updating the content, ensuring they are accessible to all and to ensure correct branding. Forms should now be simpler to complete and result in less queries for our administration team.

There are now two types of forms available:

- Standard PDF to print off and complete by hand
- Editable PDF to complete data fields electronically (new option)

Examples of the forms here - [Forms and Publications | East Sussex Pension Fund](#)

5. Surveys

5.1 The active member survey ran from 12 April 2022 to 10 May 2022. Over 1,000 members completed the survey. A [report](#) detailing the results together with Fund commentary/actions has now been published.

5.2 The pensioner survey ran from 17 May 2022 to 13 June 2022. Over 2,300 pensioners completed the survey – a 25% response rate. A [report](#) detailing the results together with Fund commentary/actions has now been published.

6. Employer Forum

6.1 Promotional activity has continued to promote the 2022 Employer Forum being held in person on the 24th of November 2022. A full agenda was published as part of the recent employer newsletter. 69 people have registered for the event (as of 14.10.2022)

7. New guides

7.1 As a result of feedback from the surveys about lack of pensions knowledge the Fund has produced and delivered two new guides for members. [LGPS brief guide](#) and [Planning for retirement guide](#).

8. Annual benefit statements

8.1 Deferred and active members of the pension scheme have their 2022 annual benefit statement (based on information on 31 March 2022).

The statements show:

- Personal and employment information

- Summary of total benefits
- Value of death in service benefits
- Projections if the member remains in the scheme until their normal pension age (for active members)
- A full breakdown of how total benefits have been calculated.

Members received an email or letter telling them that their statement is available via 'My Pension' the member self-service portal.

8.2 This year's templates were improved in terms of layout and content and built using brand style. More work will happen to make the templates even better in 2023.

8.3 On the website there is a document 'Your annual benefit statement explained' to help anyone struggling to understand the breakdown of their pension information.

8.4 Where members have both deferred and active records, they would have received separate communications for each. The Fund issued over 33,000 communications regarding statements prior to the 31st of August deadline.

9. Supporting other Fund communications work

- 9.1 The Communications Manager continues to support officers in other areas:
- implementing revised brand, simplifying content, and ensuring accessibility guidelines are adhered to.
 - Employer toolkit – work has begun to draft communications that will help support employers in the main key processes they are responsible for. The Fund will look to roll out this substantial piece of work at the Employer Forum in November.
 - Supporting the administration area by considering alternative ways of communicating. An example of this would be where we must obtain a Life Certificate (to prove existence) for overseas customers. In the past this has been conducted by post meaning lengthy delays in receiving the certificates. This year the Fund issued communications by email and directed pensioners to a webpage. Using this electronic method meant a substantial improvement in the speed of the process.

10. Conclusion

10.1 Pension Board are recommended to note this report.

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