

The London Borough of Southwark Pension Fund

COMMUNICATIONS STRATEGY 2021

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Introduction

This is the communications strategy for the London Borough of Southwark Pension Fund (the **Fund**), part of the national Local Government Pension Scheme (**LGPS**), administered by Southwark Council.

As at 31 March 2021, the Fund had 24,451 members broken down as follows:

- 7,126 contributing (or active) members;
- 7,988 retired and/or dependent members; and
- 9,337 former (or deferred) members;
- 44 admitted and scheduled bodies.

This document provides an overview of how Southwark Council communicates to those members and other interested parties and stakeholders.

Any enquiries in relation to this document should be sent to:

Miss Carys Haines, Pensions Liaison Officer

Email: Carys.Haines@southwark.gov.uk

Phone: 020 7525 4782



Regulatory framework

A written statement of the strategy is a requirement of the provisions of Regulation 61 of the Local Government Pension Scheme Regulations 2013 which require Southwark Council to prepare and maintain a written statement setting out the policy of communicating with Fund members, representatives of members, prospective members and employers.

The statement must also set out the Fund's policy on the provision of information and publicity to Fund members and their representatives on the format, frequency and method of distributing that information, and on the promotion of the Fund to prospective members and their employers.

Key objectives

- Communicate clearly and concisely using plain language wherever possible;
- Promote the Fund as a valuable benefit and provide information so members can make informed decisions about retirement provision;
- Provide a service that is highly valued by members and other stakeholders;
- Make the best use of technology but also ensuring that different communication needs are accounted for; and
- Shape future communication through regular review and feedback.

Accessibility

The Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018 means that a website or mobile device must be more accessible by making it 'perceivable, operable, understandable and robust'.

Responsibilities and resources

Within Pension Services (the pension administration function) the Pensions Manager has responsibility for preparing communication material and organising communication events with the support of key personnel.

Communication material is produced within Pension Services by the Technical & Projects Team (with some support by our actuaries Aon Solutions UK Limited) and our communication partner, Concert, Buck company.

The communications strategy is approved by the Strategic Director of Finance and Governance, on the advice of the Pensions Advisory Panel (**PAP**) and following review by the Local Pension Board (**LPB**).



Communication with key stakeholders

The key stakeholders that we communicate with and who form part of this communications strategy are:

- Active members;
- Deferred members;
- Pensioner members;
- Prospective members;
- Pension sharing members;
- Spouses, partners and dependents;
- HR and Payroll;
- Scheme employers (schools, admitted and scheduled bodies);
- Senior Managers;
- Recognised Trade Union Representatives; and
- Elected members, PAP and LPB.

We seek to utilise electronic and digital forms of communication wherever possible (particularly since COVID-19 and the need for more home and remote working). However, there will always be examples where that is not appropriate, including such factors as member demographic, highly personal or sensitive matters where the need for face-to-face communication is needed, training, and regulatory factors.

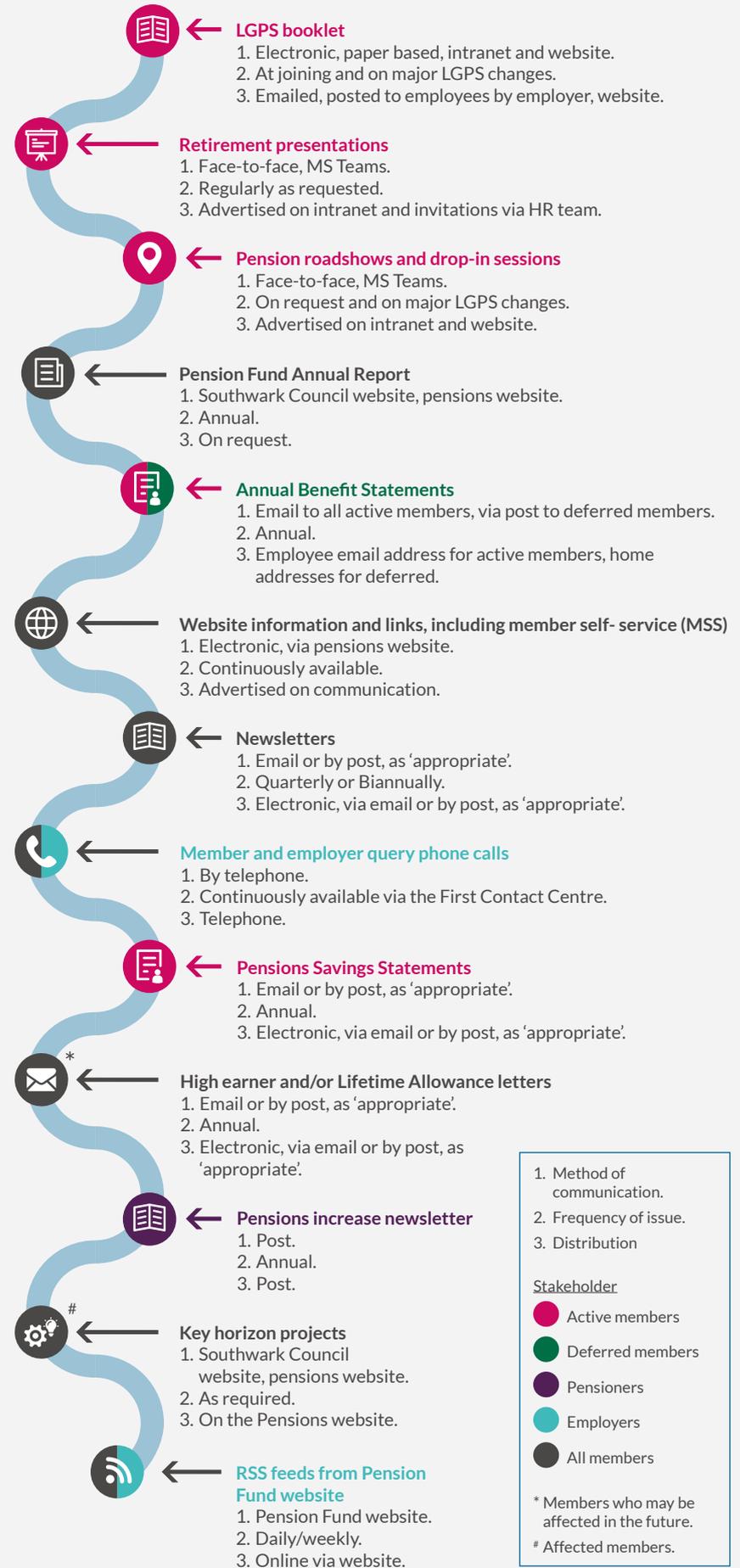
We will also aim to meet any requests to improve the accessibility of information such as larger font or information in another language.

As Southwark Council administers the Fund, all communication conforms to the council's overall branding and house style.

Active, deferred and pensioner members

We aim to ensure that as far as reasonable, members understand their benefits and rights under the LGPS. We also aim to ensure that members receive timely and accurate information. →

Key approaches are outlined below:



Prospective members and their employers

The objective is to increase take up of the pension and also to use as a means of attracting potential new employees and retaining existing staff. We support Southwark Council’s Human Resources team and Fund employers to meet these objectives, as we do not have direct access to prospective members.

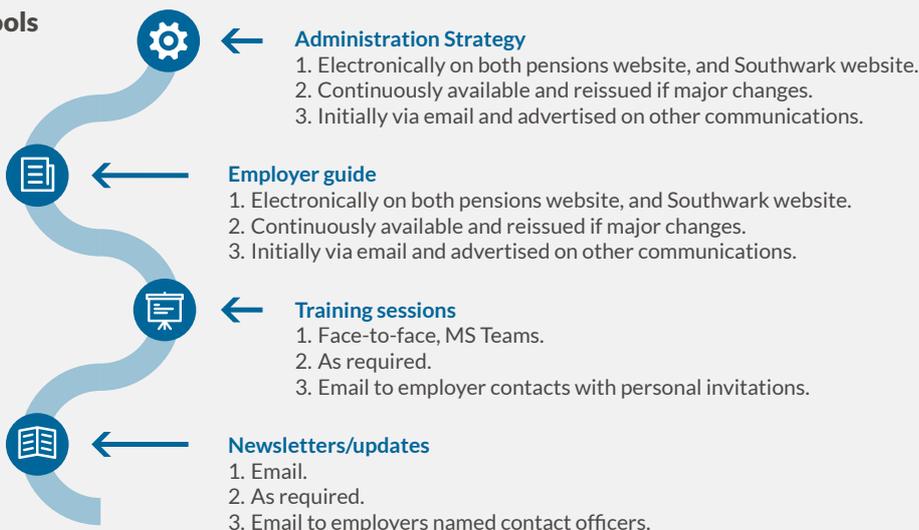
We support these objectives by making available the LGPS leaflet which is distributed to potential or new employees via the employers.

Fund employers plus Southwark Schools

The objective is to ensure that employers other than the Council understand their responsibilities and benefits under the LGPS, particularly the importance of timely and accurate information.

Key approaches are outlined on the right:

- | |
|--|
| <ol style="list-style-type: none"> 1. Method of communications. 2. Frequency of issue. 3. Distribution. |
|--|



Training

There are now 25 training courses for both internal and external employees/employers and are now available to be booked via My Learning Source (MLS) and delivered via both Microsoft Teams and in person.

Senior Managers

The objective is to ensure that Senior Managers are aware of the benefits of the Fund, to enable them to support their staff and, in addition, to help them understand the cost and funding implications so that they can make informed employer decisions.

HR and Payroll

The objective is to ensure that HR and Payroll are fully supported so they can assist line managers when dealing with staff matters that affect pension benefits. This is an ongoing and key partnership within the Council to ensure that member benefits are understood and communicated correctly.

Pension Services run regular training and knowledge management sessions for HR.

Union representatives

The objective is to provide union member representatives with Fund information to support their members. It is also to ensure that they are aware of Fund policy.

The union representatives are involved in some pension briefing sessions, and ad-hoc face-to-face meetings are held as required.

Elected member, PAP and LPB

The objective is to ensure that these stakeholders are aware of their responsibilities in relation to the Fund, to seek their view on discretionary policies and responses to Government consultations.

These objectives are achieved via a training programme for new and existing panel and board members. In addition regular briefing papers will be presented to the panel and the board on key areas relating to the Fund.



Performance measurement and review

We measure our performance in how effectively we communicate with each of the stakeholder groups. We use a combination of qualitative feedback and measurable targets in order to assess both the effectiveness of the communications strategy and also to measure our performance in meeting the requirements of the strategy.

The strategy is reviewed on a regular basis to ensure that it meets the needs of stakeholders and regulatory requirements.

We consider any qualitative feedback from stakeholders to identify if revisions are required to either the strategy itself or communication approaches or material.

The Fund website is able to provide customer satisfaction surveys, so that instant feedback is available. Pension Services will also be undertaking staff and member surveys, to improve any areas necessary.



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Further information: approved by Strategic Director of Finance and Governance following recommendation by Pensions Advisory Panel.