Report to Pension Fund Board

Date:	17 March 2021
Title:	**Employer and member communications**
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Recommendations:	**The Board are asked to note and comment on the report.**

1.   Executive summary

1.1   The purpose of this report is to provide an overview of Member and Employer communications for 2020/2021.

2.   Content of report

2.1   In 2020/2021, all Fund communications have been influenced by three overriding factors. These are; i) rebranding following unitary, ii) the introduction of accessibility regulations (2018) and iii) changes to business operations due to COVID-19.

2.2   On 1 April 2020, Buckinghamshire Council (BC) replaced the four district councils and county council. New branding guidelines and communication standards were introduced. All communication sent within the team, including emails and letters, as well as web pages and documents held online, were required to conform to the new standards. A new logo was designed by the BC graphics team specifically for the Buckinghamshire Pension Fund (BPF). This has allowed BPF to assume a brand identity as the administering authority, distinguishing us from BC as the employing authority, while still maintaining a crucial affiliation. The rollout of the new branding standards has been a vital project over the past year and influenced all new communication campaigns.

2.3   The public sector bodies accessibility regulations (2018) set out standards for ensuring websites and mobile applications can be used by most people, including those with long and short term disabilities. All content created after 23 September

2018 must be compliant with this legislation from 23 September 2020. From 1 April 2020, the web content team at BC have scrutinised any content added to the web for compliance; however, it remains the individual team's responsibility to make any necessary amendments to non-compliant content. Significant review and adaptions were required for all our online documents and forms. While this has presented a challenge, we have managed to make excellent progress. Most documents held on our website are now compliant. Accessibility regulations have fed into all forms of new design for communications and will continue to influence future projects.

2.4   COVID-19 has, understandably, had an important influence on communications during the past year. Despite the requirement for adjustment, we have been able to promote our digital communications agenda as well as experiment with a wider variety of digital medium for member and employer engagement. COVID-19 will likely continue to impact on the method of engagement with members and employers over the next financial year.

2.5   While these overarching factors have significantly influenced the approach to communications during 2020/2021, they have by no means presented a barrier and we have been able to undertake important projects and make significant gains in improving communications. The remainder of this report summarises key projects undertaken throughout the year.

2.6   Forms for both members and employers are being reviewed to improve customer experience. Many of our forms are now digitally enabled. This means they can be completed without the need for printing. Forms are designed in an accessible standard with clear instructions for the user regarding the purpose of the form and how to complete it correctly. Making improvements to forms ensures a greater probability of accurate completion, supporting both the member/employer and the P&I team.

2.7   The deadline for full web migration of BCC legacy sites to the new BC website is currently set at 31 March 2022. In preparation for the transfer, all web based documents and web pages are currently being reviewed to ensure they are fit for purpose. This is a large undertaking as we currently have 47 live pages and 21 forms/guides. However, progress has already been made over 2020/2021, and a new section of the website devoted purely to deferred members will be launched this coming April/May. This project will continue into the next year.

2.8   Membership of My Pension Online (MPO) has increased over the previous year from 25.5% of all members fully registered in March 2020 to 28.19% in January 2021. Registration for MPO is being promoted on all print media, newsletters and features. Employers are also asked to encourage employees to sign up and distribute a revised

starter guide to new LGPS members promoting use of the website. Promotion of MPO will continue with targeted communications aimed at specific membership cohorts. The first group we will be targeting is pensioner members. In the coming weeks, a letter will be sent to all non-registered pensioners providing joining instructions, promoting the benefits specifically for them and offering assistance with the registration process.

2.9   We have also undertaken a project to decrease the number of partially registered members on MPO, i.e. those that have started but not completed the registration process. We have identified factors that may be causing the issue and have taken steps to minimise these. The next phase will be to send out direct targeted communications to partially registered members which we hope will increase the number of fully registered members.

2.10   With face to face meetings on hold, employer training is being conducted as webinar presentations via MS Teams Live events platform. Promotion for webinars is performed through our dedicated webpage, as well as In-Form and direct employer communications. The first presentation, 'The SLA, The PAS and Submitting information' was held on 25 January 2020. The event had a total of 41 attendees which is the best turnout for employer training on record. The webinar was aimed at a general level to appeal to a broad cross-section of employers. While comprehensive training is beyond the scope of the webinar, it served as a useful tool to engage hard to reach employers and promote the one to one training offered. 14 attendees completed feedback surveys following the webinar, the details of which are attached at appendix 1. Feedback was generally positive, and where negative feedback was received and we could identify the employer, we made contact to improve working relationships. Future webinars are planned, and we hope to continue to develop these further over the coming year.

2.11   We will be launching new starter presentation webinars via MS Teams this coming April. These presentations will be 45 minutes in length, conducted quarterly and available for all new BPF LGPS members to access. It is hoped that these webinars will increase membership retention and encourage take up of MPO. Promotion for the events will be through new starter guides and employers.

2.12   Specific campaigns have been used to communicate important scheme changes this year. One such campaign was to provide reassurance and answer any queries about the impact of COVID-19 on pensions. Specific COVID-19 webpages for pensioner, active and deferred members were created. COVID-19 guidance for employers was communicated through direct email messaging and a dedicated web page. Our COVID-19 pages have been viewed 693 times since June.

2.13   On 4 November HM Treasury introduced a £95k cap on exit payments to public sector workers; however, the LGPS regulations conflicted with the cap, leading to a position of legal uncertainty. A dedicated webpage was set up to provide updates to members on this and has been viewed 455 times since October. Employers were kept up to date via direct emails, as well as special features and bitesize training in In-Form. Forms and letters were redesigned to ensure technical compliance and to protect the Fund in the event of challenges. Since the announcement of the disapplication of parts of this legislation, a new project will now begin to revert forms and letters to previous standards. The communication objective to members and employers will be to inform them of this important update, whilst also preparing them for anticipated replacement legislation.

2.14   We are in the early stages of the McCloud project and have sent preliminary communications to members and employers. For members the focus has been to keep them updated on the case. This has been done via our dedicated web page and through the newsletters sent with annual benefit statements. The McCloud webpage has been viewed 2622 times since May. For employers, communication has been via email, as well as special feature articles and updates in In-Form. The focus with employers has been to ensure they are kept updated on developments and that they are taking appropriate steps in anticipation for data collection.

2.15   Our newsletters have been revamped to comply with new standards and to enhance customer experience and engagement. Our employer's newsletter has been rebranded as In-Form. The new format includes Fund and scheme updates, bitesize training, employer FAQs and special feature articles. In-Touch, our pensioners newsletter, will also be receiving a makeover. This year, we are receiving support from the BC graphic design team and aim to make the overall look and feel of the publication easy to read and visually appealing.

2.16   Feedback is essential for assessing satisfaction levels amongst our members and employers. It allows us to understand their needs and assess which areas we are succeeding in and which require improvement. Over the past year, we have undertaken a project to collect more feedback. This began with the introduction of the feedback inbox; a specific mailbox welcoming comments, suggestions and compliments, promoted through member communications. To capture more quantitative feedback, we have set up digital employer surveys via the platform used by BC 'Citizen Space'. The digital dashboard allows for quick and succinct analysis of data as well as the opportunity for employers to submit anonymous comments. Surveys are easy to distribute, fast to complete and are targeted at specific areas to analyse customer experience. We are hoping to expand this project by creating surveys for members over the coming year.

3.   Other options considered

3.1   N/A

4.   Legal and financial implications

4.1   N/A

5.   Corporate implications

a)   N/A

6.   Consultation and communication

6.1   N/A

7.   Next steps and review

7.1   N/A