

Communication Policy Statement 2019

Introduction

This document outlines how we communicate with our stakeholders. To communicate effectively, we use different methods according to the need and the target audience.

We have five key stakeholder groups:

- Scheme members
- Prospective scheme members
- Employing authorities
- Pensions Services' staff
- Other bodies, for example Pensions Fund Panel and Board, Scheme Advisory Board, prospective employing authorities.

We are committed to communicating clearly and effectively and we aim to provide a high-quality service to all our stakeholders. Our statement of service standards for employers and scheme members can be found on our website.

Methods of communication

Our long-term aim is to promote electronic communication with all stakeholders. This will be achieved through the promotion of our online portal which should be the primary source of information for our members and employers.

Our communication with scheme members

Scheme members include current contributors, those with a deferred benefit and those receiving a pension. Scheme members must be given detailed information about the scheme and their own benefits.

Member portal

Scheme members can register to access the member portal, which is a secure area of the website in which they can view their annual benefit statements and update their personal information.

Website

Our website offers extensive information for scheme members. It contains links to other relevant organisations and is updated with all new legislation and relevant information. The website is the prime source of information on the pension scheme and ensures timely, up-to-date and easy-to-access information for all our stakeholders.

Scheme literature

The *Employee's Guide* is the main reference point for current scheme members. This and other scheme literature and forms are available on the Pensions Services website. We update this regularly, usually when regulations are changed, Members may also obtain scheme literature from their employers.

Member support

We have a general query call centre which operates during office hours. A voice mail service takes messages in the event of staff training within office hours. We aim to answer 95% of the incoming queries without the need to refer to our operational teams. We also have a general email address for all queries and at the bottom of each email we send there is a link to a feedback survey.

Correspondence

We use post and email for correspondence with scheme members. Annual Benefit Statements are available via the member self service. We also provide information to members via their employer.

We notify members of details of any scheme changes within three months of the change.

Benefit statements

Each year, we make an annual benefit statement, showing scheme benefits at 31 March, available to all current and deferred members via Member Portal. Members have the choice to opt out of this online service and instead receive paper statements. All statements are made available by the end of August each year.

Pay advice slips and P60s

We send pay advice slips to pensioners each April and send a P60 in April if the pensioner has had income tax deducted during the year. We also send a payslip to pensioners if there has been a change of more than £1 in their monthly payment.

Newsletters

A newsletter is sent to pensioners each year in March and April.

Declaration of Pension Entitlement

Every year, we send forms to pensioners that live overseas to verify the continuing entitlement to receive pension payments. They will also be sent when we have payments or mail returned.

Report and accounts

In the autumn, a summary of the accounts, investment management and administrative arrangements is made available to current, pensioner, and deferred members. The annual report and full accounts are available to members on request or from our website.

Our communication with prospective scheme members

To provide information about the scheme, we give employers relevant information to ensure that eligible staff are aware of their pension options.

Scheme literature

Employers give all new employees access to information on appointment including the starter information booklet and form. A death grant 'expression of wish' form and a pension transfer booklet is available on the Pension Services website. Other scheme literature is available direct from us or from our website.

Website

The website contains a dedicated 'New Member' section, which outlines the benefits of the scheme and answers some common questions for prospective members.

Our communication with employing authorities

We communicate with employing authorities in several ways to help them meet their responsibilities as scheme employers.

Scheme literature

An *Employer Manual* is available to all employing authorities. It contains details of procedures and their responsibilities. Copies of leaflets and forms are also available to employers from the website or on request from Pension Services.

Correspondence

We send a regular electronic newsletter to keep employing authorities up to date with the latest regulation changes and proposals, as well as any changes in administration.

We also send ad hoc email communication to advise employers of any changes or information they should be aware of or would find useful.

Website

The website has a dedicated section for employers, with some areas password protected. It gives the latest news and an electronic version of the *Employer Manual*.

Employer training

We hold regular employer training days, and offer targeted training on request from employers, in addition to dealing with queries via phone or email.

Administration strategy

We publish an administration strategy which sets out the roles and responsibilities of the Hampshire Pension Fund and the employers.

Employer liaison meetings

All employers may request a meeting with us, and we attend established employer forums such as the Payroll Officers' Group. We also hold six-monthly meetings with an employer focus group.

Reports and accounts

We send an electronic copy of the annual report and accounts to each employer. We publish an updated Statement of Investment Principles and make it available to employers within three months of the Joint Pension Fund Panel and Board approving any significant amendment(s).

Valuation report

We send the provisional outcome and the full actuarial report on the triennial valuation to employers when they are available.

Pension Fund Annual Employers Meeting (AEM)

We invite all our employing authorities to attend the Pension Fund Annual Employers Meeting. As well as providing information on issues such as the annual report, scheme changes and investment managers' performance results, the Annual Employers Meeting provides formal and informal opportunities for employers to ask questions of the Joint Pension Fund Panel and Board or those presenting.

Our communication with Pensions Services staff

It is vital that our staff are kept up to date with all changes to the scheme so that they can continue to administer it effectively and offer a high-quality service to members and employers.

Email

Latest news and information is available on the staff webpages. In addition, we may send key information via the group distribution list.

Internet access

All staff have internet access, allowing access to a wide range of pension information.

Employer contact information

A database of contact information for all employing authorities is kept up to date and is available for use by our staff.

Meetings

Regular meetings are held, both informal and formal, within teams and across groups of staff.

Regular section briefings are held to share information across the whole of our section.

Staff training

We undertake regular staff training to ensure that our staff have the relevant knowledge and skills to undertake their role. This includes staff workshops and supporting staff taking any relevant professional qualifications. All new staff undertake a structured development programme.

Our communication with other bodies

Members' representatives

We provide information to members' representatives on request. Any issues that need consultation with members' representatives are referred to the regular meetings held with the Head of Human Resources, Operations.

Joint Pension Fund Panel and Board

The Joint Pension Fund Panel and Board receive reports from the Director of Corporate Resources. Although these usually concern investment issues, they will advise the Panel and Board on changes to administrative arrangements or scheme rules where relevant.

Prospective employing authorities

New employers receive information about the responsibilities and costs of joining the scheme and are invited to attend employer training sessions as well as having access to the employer website.

Complaints and appeals

We have a comprehensive process for dealing with complaints and appeals. Full details of the Internal Dispute Resolution Procedure is available on our website:

<https://www.hants.gov.uk/hampshire-services/pensions/local-government/contact/customer-service/complaints-procedure/hampshire-county-council>

Publications matrix

| <i>Document</i> | <i>Format</i> | | <i>Available to</i> | | | | | <i>Published</i> | <i>Reviewed</i> |
|--------------------------------|---------------|----------------|----------------------------|------------------------|-------------------------|-------------------|------------------|------------------|-----------------------|
| | <i>Paper</i> | <i>Website</i> | <i>Prospective members</i> | <i>Current members</i> | <i>Deferred members</i> | <i>Pensioners</i> | <i>Employers</i> | | |
| Employee's Guide | X | ✓ | ✓ | ✓ | ✓ | X | ✓ | Always available | As regulations change |
| Employer Manual | X | ✓ | X | X | X | X | ✓ | Always available | As regulations change |
| Reports and accounts | X | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | Annually | Annually |
| Benefit statements | ✓ | ✓ | X | ✓ | ✓ | X | X | Annually | Annually |
| Pensioners' newsletter | ✓ | ✓ | X | X | X | ✓ | X | Always available | Annually |
| Service standards | X | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | Always available | Annually |
| Complaints and appeals process | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | Always available | Annually |