

# Communications Working Group

## Agreements and Actions

### Tuesday 7 September 2021 - Microsoft Teams meeting

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#### 1. Apologies and introductions

##### Present

Alastair Johnston (**AJo**) Durham Pension Fund

Amanda Jupp (**AJu**) Surrey Pension Fund

Andy Hemming (**AH**) West Midlands Pension Fund

Becky Clough (**BC**) Shropshire Pension Fund

Ben Altoft (**BA**) Avon Pension Fund

Guy Hayton (**GH**) Merseyside Pension Fund

Jacinta Wilmot (**JW**) Environment Agency

Karen Brooker (**KB**) Kent Pension Fund

Karen Thomas (**KT**) Gwent (Torfaen) Pension Fund

Kath Meacock (**KM**) Flintshire Pension Fund

Lindsey Davison (**LD**) Tyne and Wear Pension Fund

Lorraine Bennett (**LB**) LGPC Secretariat

Martin Griffiths (**chair**) Staffordshire Pension Fund

Matthew Allen (**vice-chair**) Cornwall Pension Fund

Pamela Bruce (**PB**) Lothian Pension Fund

Rebecca O'Shea (**RO**) Oxfordshire Pension Fund

Sharon Grimshaw (**SG**) Northamptonshire Pension Fund

Stuart Duncombe (**SD**) West Yorkshire Pension Fund

William Girvan (**WG**) NILGOSC

## Apologies

Mandy Judd (**MJ**) Hampshire Pension Fund

Mathew James (**MJa**) Dyfed Pension Fund

Rachel Abbey (**RA**) LGPC Secretariat

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## 2. Subgroups

**Digital engagement subgroup:** Becky O'Shea, Kath Meacock, Stuart Duncombe, Jacinta Wilmot and Amanda Jupp.

**Letter templates subgroup:** Stuart Duncombe, Sharon Grimshaw, Ben Altoft, Karen Thomas.

**Employer ill health briefing note subgroup:** Stuart Duncombe, Guy Hayton, Mandy Judd (or another rep from Hampshire), Martin Griffiths.

**McCloud subgroup:** Martin Griffiths, Matthew Allen, Kath Meacock, Lindsey Davison and Amanda Jupp.

**Exit payment reform employer subgroup:** Matthew Allen, Guy Hayton, Stuart Duncombe and Rebecca Clough.

**Exit payment reform member subgroup:** Martin Griffiths, Amanda Judd, Rebecca O'Shea, Jacinta Wilmot and Steve Jones.

**Member website subgroup:** Rebecca Clough. Leah Swane, Rebecca O'Shea, Andy Hemming, Sharon Grimshaw, Karen Brooker, Louise Campbell (Scotland).

**Pension credit wording subgroup:** Martin Griffiths, Stuart Duncombe, Alastair Johnson and Guy Hayton.

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## 3. Actions and agreements from last meeting held 8 June 2021

LB confirmed that all the action points had been completed except Action 5 which is carried forward.

**Action 1:** LGA to produce template pension credit wording and share with the subgroup for comment.

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#### **4. COVID-19**

##### **Updates from the group**

The Chair asked if funds were still experiencing any issues because of the pandemic and if the group want to keep COVID-19 as an agenda item. Feedback was:

- Training and integrating new staff are problematic across the board – it is hard to make staff feel part of a team remotely
- Some authorities are selling their premises meaning that home working is going to be the norm going forward. It also means face to face meetings with members /employers are unlikely.
- Some funds are reviewing their website to remove all references to COVID as the change to their working practices is no longer due to the pandemic.
- Some are not allowing face to face meetings because of rising cases in the local area.
- Members are complaining that funds are hiding behind COVID when they say services are still impacted
- Although social restrictions are no longer a legal requirement, many funds are still having to adhere to them in their office spaces – this means their service is sometimes still impacted
- The group agreed to keep COVID-19 as an agenda item going forward.

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#### **5. Annual benefit statements (ABS)**

The Chair asked the group to feedback their experience this year:

- Most funds now send statements electronically. They use a bulk email facility to let registered members know the statement has been uploaded.
- Most funds ask employers to let active members know the statements are available and some provide a list of unregistered users for more targeted communications.
- Some provide template wording for employers to use in emails or put on payslips / notice boards.
- A few funds are still sending letters/newsletters to the home address of unregistered users to notify them. Northamptonshire is making use of the free text service offered by the Government where they have a mobile number.
- The Environment Agency is planning to highlight the ABS in pensions awareness week which will take place from Monday 13 to Friday 17 September.

- There is still a concern about the lack of member engagement, particularly with younger members. GH confirmed the new version of My Pension Online (Heywood users) allows funds to see the open rate of the ABS. Of the funds that have looked at this the average was about 58%.
- The group agreed that it might be useful to do some benchmarking in this area and noted that this is already in the remit of the digital engagement project.
- Some funds are reluctant to go completely digital because of the danger that members will disengage.
- It was agreed to keep digital engagement on the agenda and review what funds are doing to ensure continued engagement of scheme members.

**Action 2:** Group members to feedback on digital engagement at the next meeting.

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## **6. Member website**

### **New website**

LB gave an update on the new member website project. Timings have slipped slightly. The website is now expected to launch by the end of the calendar year, instead of the end of September.

LB showed the updated illustrations which have been changed to be more inclusive. The group was positive about the changes.

The group asked how the launch would be handled. LB confirmed that the LGA is relying on funds to communicate the launch to their members and asked for suggestions. The group agreed that the member website subgroup would look at the launch and produce guidelines for funds.

LB also confirmed that the new logos will be provided in a variety of colours and reversed out – these will be made available on [www.lgpsregs.org](http://www.lgpsregs.org) and [www.scotlgpsregs.org](http://www.scotlgpsregs.org)

**Action 3:** LB and RA will arrange a meeting with the member website subgroup to discuss how to launch the new site.

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## **7. Digital engagement**

### **Subgroup update**

SD informed the group that RA has circulated a draft digital engagement guide to the subgroup. Each member of the subgroup was tasked with looking at a section and feeding comments back to RA.

The subgroup is due to meet shortly to discuss the feedback. The group are also keen for the subgroup to look at the possibility of benchmarking.

**Action 4:** RA to arrange a meeting for the subgroup to discuss next steps and benchmarking.

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## **8. Transfers and aggregations**

The Chair asked the group if they have amended their processes and communications following the publication of LGA's non-club transfer out guide. Feedback included:

- Some funds are in the process of making changes whilst some have already completed them.
- Lots have signed up to [TPR's pledge to combat pension scams](#). This involves regularly warning members about pension scams. Some funds sent out scam warnings with the ABSs.
- Avon also warned their pensioner members of potential scams with people asking for bank details.
- The group discussed when it was appropriate to ring members if they have concerns about a transfer.

LB informed the group that there are likely to be further changes needed to processes and documentation because of the recent consultations by DWP on pension scams and a stronger nudge to pensions guidance. The LGA understands that TPR will issue guidance shortly in relation to the changes that will be brought in as a result of the [Pension scam consultation](#).

LB also confirmed that the LGA is currently reviewing the transfer discharge forms and still plans to review the aggregation letters this year.

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## **9. McCloud remedy**

The Chair asked the group to feedback how their communications with employers are going and if they are receiving many member queries:

- Not all funds have asked employers for the hours and service break data yet.
- Some funds continued to collect hours and service break data.
- GH confirmed Merseyside will be asking employers to certify the data they already hold and submit any additional data.

A discussion took place about the upload facilities provided by both the main software providers. The group agreed they all have major issues with both upload

facilities. Issues include not being able to handle large amounts of data and data being overwritten – even if it relates to a previous year.

No funds are being approached by members asking for information about McCloud.

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## **10. Regional communication groups**

### **Joint communications group – chaired by Shropshire**

BC gave an update on the work of the Joint communications group:

- McCloud – KM shared wording which was used in the collaborative newsletter
- Deferred ABS – different methods of providing information were discussed. Some are not producing a document but showing an ABS screen on the online portal
- Exit pay – all funds will continue to inform members and employers about the exit cap
- Accessibility - a subgroup has been set up to discuss creating accessible documents in more detail following on from training on how to create accessible documents.
- Aggregation – a lot of time is spent chasing funds for information. A request was made for the LGA to come up with an agreed procedure
- Full scheme guide – one fund would like the LGA to reconsider updating the guide. LB informed the group again that this would have to be at the expense of other work and there is no capacity at the current time
- COVID-19 issues are still on the agenda
- Members are having issues registering on online pension portals – regardless of the provider. The group is lobbying Aquila Heywood for improvements to the process.

Welsh regional group – has not met since the last meeting.

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## **11. Communications work plan**

LB talked through progress on the items in the workplan. The group agreed that the Pensions Dashboard should be added so that all funds know we will be looking at it, when appropriate.

**Action 5:** LB to add Pensions Dashboard to the workplan

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## 12. AOB

- SG shared the retirement form used by Northamptonshire and Cambridgeshire. They have received feedback that the form is too long and complicated and SG asked if anyone would share their forms to see how they compare.

JW informed the group she has put together a guide to accompany the retirement form which she is happy to share. MG, GH, SD and KB all agreed to share their forms.

- The group discussed issues getting Adobe Pro – it is the gold standard for accessibility but IT departments are reluctant to provide it because it requires individual licences. Some funds use Kofax instead.

**Action 6:** Group members to share retirement application forms.

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## 13. Future Meetings

Next meeting will be held on 11 January 2022. It will be a hybrid meeting.