



West Northamptonshire Council

Pension Committee

30/03/2022

Mark Whitby – Head of Pensions

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| Report Title | 2022/2023 Northamptonshire Pension Fund communications plan |
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Contributors/Checkers/Approvers

| | | |
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| West MO | John Murphy on behalf of Catherine Whitehead | 7/3/2022 |
| West S151 | James Smith on behalf Martin Henry | 2/3/2022 |
| Head of Pensions | Mark Whitby | 23/2/2022 |

List of Appendices

Appendix 1 – Northamptonshire Pension Fund communications plan

1. Purpose of Report

- 1.1. The purpose of the report is to seek approval of our communications plan for the 2022/23 scheme year.

2. Executive Summary

- 2.1 The communications plan outlines our planned communication activities on a monthly basis for each stakeholder group. As well as sending out planned newsletters, surveys, employer training and web updates it also highlights some of our key initiatives for the year.

3. Recommendations

- 3.1 The Pension Committee is asked to approve the communications plan

- 3.2 Reason for Recommendation: To accord with the Local Government Pension Scheme Regulations 2013 to provide information and publicity about the scheme to members and scheme employers.

4. Report Background

- 4.1 Regulation 61 of the Local Government Pension Scheme Regulations 2013 state that an administering authority must prepare, maintain and publish a written statement setting out its policy concerning communications with members and scheme employers.
- 4.2 The communications plan for 2022/23 details the communications activities to be undertaken within the scheme year and can be found in appendix 1 of this report.

5. Issues and Choices

- 5.1 The communications plan included as appendix 1 outlines our planned communication activities for the year, on a monthly basis, for each of our stakeholders.
- 5.2 The communications plan shows our intention to trial communications segmented by life stage like retirement planning for the over 50s and a follow up communication for new starters to the Fund, reminding them of key activities that they should consider like transferring in a previous pension.
- 5.3 It also highlights our planned engagement with key stakeholders on our website review.
- 5.4 With 2022 being a valuation year, it outlines our plan to consult with employers on our fund strategy statement and to follow up with an employers forum for further engagement.
- 5.5 The plan also includes timings for issuing statutory communications and cyclical newsletters, surveys, employer training, and web updates.

6. Implications (including financial implications)

6.1 Resources and Financial

- 6.1.1 There are no direct finance and resourcing implications of this plan. Ongoing communication costs are picked up in the administration budget.
- 6.1.2 Our drive to increase electronic communications should save costs in the long term.

6.2 Legal

- 6.2.1 Not applicable.

6.3 Risk

- 6.3.1 We are required by legislation to prepare, maintain and publish a written statement setting out our policy concerning communications with members and scheme employers.

The mitigated risks associated with this report have been captured in the Fund's risk register as detailed below -

| Risk No. | Risk | Residual risk rating |
|----------|--|----------------------|
| 7 | Information may not be provided to stakeholders as required. | Green |
| 17 | Failure to administer the scheme in line with regulations and guidance | Green |

The Fund's full risk register can be found on the Fund's website at the following link:
<https://pensions.northamptonshire.gov.uk/governance/key-documents/northamptonshire/>

6.4 Relevant Pension Fund Objectives

6.4.1 The following objectives have been considered in this report:

- To promote the scheme as a valuable benefit.
- To deliver consistent plain English communications to stakeholders.
- To provide scheme members with up to date information about the scheme in order that they can make informed decisions about their benefits.
- To seek and review regular feedback from all stakeholders and use the feedback appropriately to shape the administration of the Fund.

6.5 Consultation

6.5.1 Not applicable.

7. Background Papers

7.1 Communications strategy

<https://pensions.northamptonshire.gov.uk/governance/key-documents/northamptonshire/>

Communications plan 2022/23

| Month | Active members | Scheme employers | Prospective members | Deferred members | Retired members | Dependant members | Fund staff |
|------------|---|--|-------------------------|---|--|--|---------------------------|
| APR | Member survey. LGA new website launch. | Employer responsibilities training LGA new website launch Valuation communication. | LGA new website launch. | Member survey. LGA new website launch. | Member survey. LGA new website launch. | Member survey. LGA new website launch. | LGA new website launch. |
| MAY | Member survey. | Pensionable pay & i-Connect training. Outsourcing and TUPes training. | | Member survey. Annual benefit statement communications. Online pension account promotion. Newsletter. Anti-Fraud communication. | Payslip – online pension Member survey. | Payslip – online pension Member survey. | Pensions service meeting. |
| JUN | Member survey. Website review. Planning for retirement communication and webinar. | Discretions training. Employer newsletter. Website review. | Website review. | Member survey. Website review. Planning for retirement communication. | Member survey. Website review. | Member survey. | Website review. |



| Month | Active members | Scheme employers | Prospective members | Deferred members | Retired members | Dependant members | Fund staff |
|-------------|--|--|-----------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------|
| JUL | Online pension account promotion. Member survey. | Employer responsibilities training. | Online pension account promotion. | Member survey. | Member survey. | Member survey. | Pensions service meeting. |
| AUG | Annual benefit statement communication. Online pension account promotion. Anti-Fraud communication. Newsletter. Member survey. | Active annual benefit statement comms materials for employers. Anti-Fraud communication. | Online pension account promotion. | Member survey. | Member survey. | Member survey. | |
| SEPT | Online pension account promotion. Member survey. Follow up communication for new starters. | Ill-health retirement training. Active annual benefit statement comms materials for employers. Pensionable pay & i-Connect training. Employer newsletter. | Online pension account promotion. | Member survey. | Member survey. | Member survey. | Pensions service meeting. |
| OCT | Member survey. Pension saving statements. Website review. | Employer responsibilities training. Outsourcing and TUPes training. Website review. | Website review. | Member survey. Website review. | Member survey. Website review. | Member survey. Website review. | Website review. |

| Month | Active members | Scheme employers | Prospective members | Deferred members | Retired members | Dependant members | Fund staff |
|------------|----------------|--|---------------------|------------------|-----------------|-------------------|--|
| NOV | Member survey. | Fund strategy statement consultation. Individual employer valuation results and draft contribution rates. Employer forum. | | Member survey. | Member survey. | Member survey. | Pensions service meeting. |
| DEC | Member survey. | Pensionable pay & i-Connect training. Employer contribution rate consultations | | Member survey. | Member survey. | Member survey. | |
| JAN | Member survey. | Employer responsibilities training. Employer contribution rate consultations. Employer survey. | | Member survey. | Member survey. | Member survey. | Pensions service meeting. |
| FEB | Member survey. | Pensionable pay & i-Connect training. Confirmation of final employer contribution rates. Discretions training. Employer newsletter. | | Member survey. | Member survey. | Member survey. | Confirmation of final employer contribution rates. |

| Month | Active members | Scheme employers | Prospective members | Deferred members | Retired members | Dependant members | Fund staff |
|---------------------|---|--|--|---|---|---|--|
| MAR | Member survey. Valuation report and rates and adjustments certificate. | Ill health training. Valuation report and rates and adjustments certificate. | | Member survey. Valuation report and rates and adjustments certificate. | Newsletter – All schemes Payslip – online pension promotion Member survey. Valuation report and rates and adjustments certificate. | Newsletter – All schemes Payslip – online pension promotion Member survey. Valuation report and rates and adjustments certificate. | Pensions service meeting. Valuation report and rates and adjustments certificate. |
| Ad hoc Comms | Website updates | Training Workshops Pension Bulletins Website updates Valuation Report (every 3 yrs) | Promotional Posters Website updates | Website updates | Website updates | Annual review of entitlement – May/June. Website updates | Website updates |