

Consultation, Communications and Engagement Strategy

Contents

What we are here for and what we need to do to achieve it	3
Engagement as a clear, simple and transparent activity	4
Why consult?	5
Who does SYPA consult with?	5
Types of consultation	6
Aims	6
Communication principles	6
Overriding principles	8
Targeted audiences and methods of communication	8
Section 1: Communicating with Contributing Members	10
Section 2: Communicating with Deferred Benefit Members	10
Section 3: Communicating with Pensioner Members	11
Section 4: Communicating with Employers	11
Section 5: Communicating with All Audiences	12

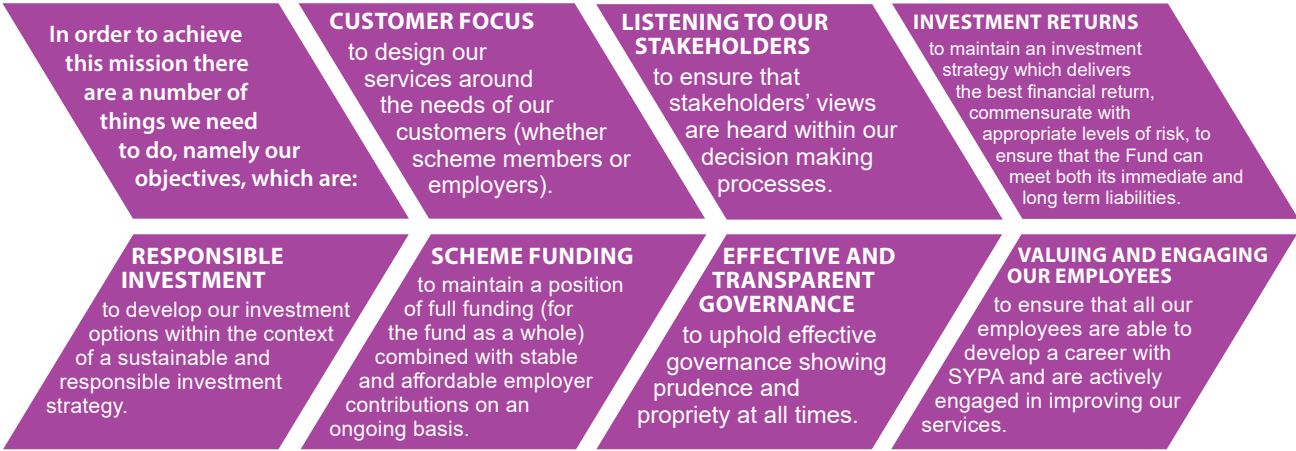
Consultation, Communications and Engagement Strategy

What we are here for and what we need to do to achieve it

As an organisation, South Yorkshire Pensions Authority’s mission is:

“To deliver a sustainable and cost-effective pension scheme for members and employers in South Yorkshire delivering high levels of customer service and strong investment returns which facilitate stable contributions.”

Our role is to run the local government pension scheme for our members, putting them at the heart of everything we do, ensuring we provide them with the best level of customer service in the most cost-effective way.



The achievement of our mission and objectives will require the fulfilment of the respective responsibilities of the elected Members of the Pensions Authority and its officers.

In relation to consultation and communication, we both have responsibilities which contribute to the delivery of an improved service in this area. We intend to consult and communicate with all our stakeholders as set out in the document and use those results to review our service delivery on a yearly basis.

The aim of this document is to explain our Consultation, Communications and Engagement Strategy, the various ways in which we consult and communicate, why we do this and what happens with the results.

George Graham
Fund Director South Yorkshire Pensions Authority

Cllr M Stowe
Chair South Yorkshire Pensions Authority

Consultation Strategy

South Yorkshire Pensions Authority (SYPA) is committed to managing our resources wisely whilst at the same time delivering a high quality service to our stakeholders.

To ensure that our priorities reflect members opinions and that they are being achieved, it is important that we continue to consult and engage with our stakeholders to obtain their views on these.

Engagement as a clear, simple and transparent activity

Pension issues can be technical, legalistic, and complex, and can work in a way that is very different from some other organisations and cultures.

This means that consultation exercises must be well planned and carefully delivered, allowing those outside the Authority to understand that there is an opportunity to participate in our work planning and add to any discussions, but that they need to understand the limitations of what can be done with their input.

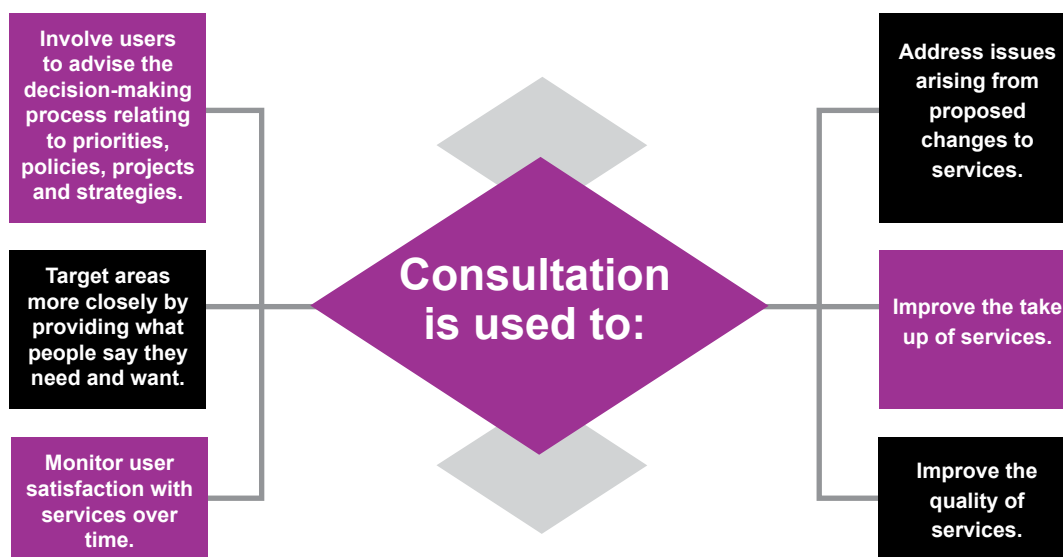
The design of SYPA's consultation exercises should therefore feature the following elements:

The following elements will assist in our strategy:

- **Clarity**
We will consider and state what the consultation exercise is about, what we hope to achieve through the consultation, who the consultees are, and what impact the results of the consultation might have.
- **Simplicity**
Issues and terminology must be explained in a simple and concise manner, making participation accessible and attractive for all.
- **Transparency**
In line with our Freedom of Information responsibilities and other existing commitments, those wishing to participate or examine our consultation processes should have access to relevant supporting materials. These would include specific consultation documents, reports and papers, and records of subsequent decisions and actions.
- **Information**
To enable those participating to make an informed contribution.
- **Inform**
Providing stakeholders with balanced and objective information to assist them in understanding issues, alternatives, opportunities and/or solutions.
- **Research**
Seeking information and involving stakeholders in the decision-making process.
- **Consult**
Obtaining stakeholder feedback on analysis, alternatives and/or decisions.
- **Involve**
To work directly with the stakeholders throughout the process to ensure that concerns and objectives are consistently understood and considered.
- **Collaborate**
To work together with our stakeholders on each aspect of any decision including the development of alternatives and the identification of the preferred solution.

Why Consult?

To ensure that the Authority provides the services that people want in the way they want them.



Who does SYPA consult with?

We have an established range of mechanisms to support consultation activities.

The people that we are committed to consult with fall into a number of 'stakeholder' categories:

Scheme Member Consultation Groups

These groups are made up of volunteers from each of our main membership categories. Representing current, deferred and pensioner members each group is consulted on a range of issues as the need arises and provide written feedback on those issues. There is a limit of 200 members on each group. The role of these groups is to provide information to:

- Inform the decision-making process surrounding service delivery;
- Improve local systems and processes;
- Improve customer satisfaction.

The results of each group are analysed and reported to officers. Any immediate actions resulting from this process are fed back for implementation. All other information is used to shape the future service delivery and forms part of the Authority's corporate planning and prioritisation process.

The results of consultation and what will happen will be reported in member newsletters. Changes that have been implemented as a result of consultation will have the effect monitored and will be consulted upon in the future to ensure continued satisfaction. The results of this will also be reported to elected Members.

Local Pension Board

The Local Pension Board became a Statutory requirement from April 2015 and is made up of equal numbers of employer and scheme member representatives. The Board's responsibility is to ensure that the Fund is managed and administered effectively and efficiently and complies with the code of practice on governance and administration. The Board meets at least quarterly, has its own terms of reference and, in addition to reviewing all authority business, is able to commission reports and request updates as and when necessary.

Types of Consultation

1. Regular Consultation

Employee Satisfaction

This is issued to all South Yorkshire Pensions Authority employees every two years. Its purpose is to monitor staff morale and provide information to managers and supervisors to maintain high levels of customer service.

Scheme Member Satisfaction

Focused surveys are carried out annually with a sample of members taken from the range of stakeholder groups. The minimum number of surveys carried out during a twelve month period will be two.

The results will be used to:

- Inform the decision-making process surrounding service delivery;
- Improve local systems and processes;
- Improve customer satisfaction;
- Involve our customers in the provision of the services they receive;
- Ensure that our service has our members' approval.

Scheme Employer Satisfaction

Focused surveys are carried out every two years with all our employers.

The results will be used to:

- Inform the decision-making process surrounding service delivery;
- Improve local systems and processes;
- Improve employer satisfaction.

2. Ad-Hoc Consultation

In addition to the timetabled surveys there will be occasions when it will be appropriate to consult our stakeholders on an ad-hoc basis. SYPA will take every opportunity to seek the opinions of its stakeholders to continually assess and improve the service provided.

Communications Strategy

SYPA recognises that in fulfilling its objectives, and in order to be fully effective, it has a duty to communicate with all its stakeholders about its actions, views, policies, and service standards.

Our Communications Strategy sets out how we intend to do this.

Aims

The aims of this communication element of SYPA's Consultation, Communications and Engagement Strategy are to ensure that SYPA's role, achievements and effectiveness are widely understood, and that we maintain a positive image with our stakeholders. This complements the consultation element of the overall strategy, so that there is an effective two-way dialogue in place.

Communication Principles

Stakeholders first

Putting stakeholders at the heart of everything we do.

Open and honest

Giving honest, open and evidence-based messages and be open to debate and questions.

Timely and relevant

Communicating proactively with our stakeholders with relevant targeted messages - the right message to the right people at the right time.

Accessible for all

Offering an appropriate choice of communications methods to help ensure that no one in our scheme is disadvantaged, for example by offering large print, audio and braille formats for communications.

Feedback

Facilitating two-way communications and encouraging participation and feedback.

Listening

Proactively seeking opinions, acknowledging them and responding quickly, helpfully, honestly and consistently.

Value for money

Making the best possible use of resources and budgets by working with colleagues and employers to share best practice.



Overriding Principles

The main aim of this Consultation, Communications and Engagement Strategy is to review and develop current methods of communications, introduce new methods appropriately and continually measure impact.

This will mean that:

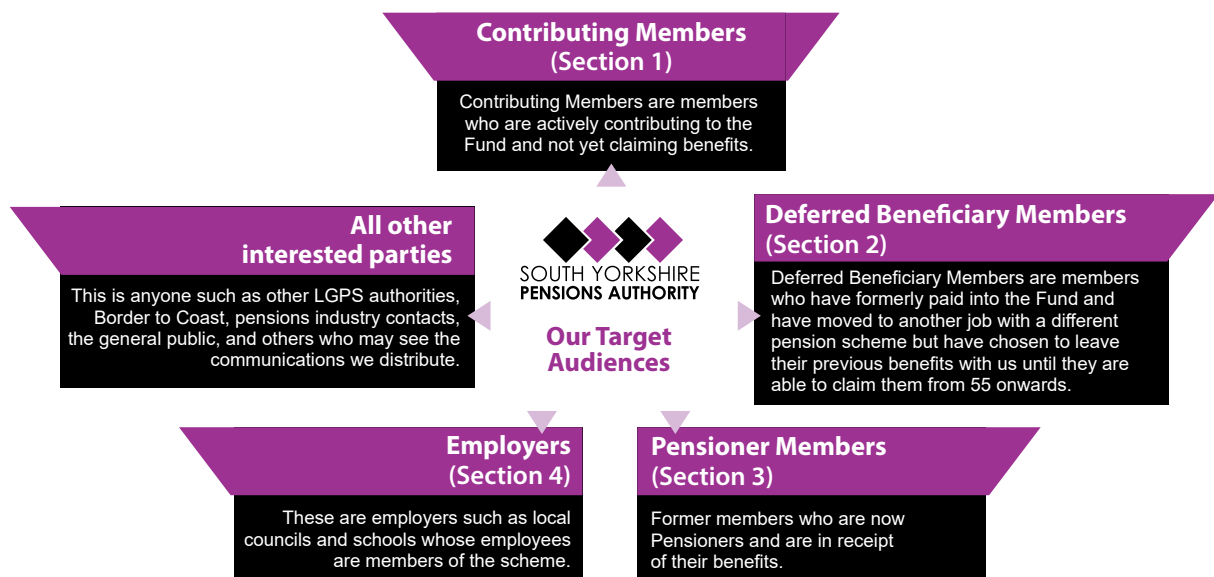
- All members, employers and organisations involved with SYPA in the delivery of our services will have a clear, consistent and positive perception of SYPA's values, services and achievements.
- Communication messages will be devised, tailored and targeted at specific audience sectors. It's important to know your audience - one size doesn't fit all. We will target the content and channels of delivery to our audience to ensure that we engage our members, and they relate to what we are saying.
- Communications will support consultation and, in turn, be informed by the views expressed through consultation.
- Measurement and evaluation will be an integral part of all communication activity.

Good communications will:

- Be clear about the key messages we are communicating;
- Help us to deliver our member and corporate priorities;
- Be of a high standard and effective;
- Help us to develop a clear brand across the organisation, including publications, presentation slides, email formats, letters and other forms of communication, under our SYPA style guidelines that are easily recognisable for our audience;
- Set out the principles that underpin all of our communications including press, web, email, letter, presentation template, consultation exercises;
- Identify the most effective methods of communicating with members, employers and stakeholders;
- Co-ordinate communications activity across the Authority with accepted strategic communications objectives;
- Identify an action plan and methods of monitoring performance/effectiveness.

Targeted Audiences and Methods of Communication

The key audiences we aim to communicate with are set out below. The types of messages that we communicate will vary, ensuring all communications are appropriate and will meet the needs of that particular audience.



Within these audiences we also have to think about the different ways we target different groups within them as not all communications will suit all members. Please see the table below which gives some examples of how we will differentiate our communications approach and key messages for different audience groups.

Audience Group	Key Messages
Contributing Members	<ul style="list-style-type: none"> • No investment risk - you get a guaranteed package of benefits which are backed by law. • Understanding how the LGPS works. • Are you saving enough for retirement? • Understanding the impact of any changes in legislation. • Your employer shares the cost of providing benefits. • Other benefits of the scheme • Keeping details up to date • Your options for Retirement • Understanding benefits for your partner if you pre-decease them.
Deferred Beneficiary Members	<ul style="list-style-type: none"> • No investment risk - you get a guaranteed package of benefits which are backed by law. • Are you saving enough for retirement? • Keeping details up to date. • Understanding your pension. • Understanding the impact of any changes in legislation. • Understand the implications of transferring out of the Scheme. • Communicating changes. • Benefits of retiring online.
Pensioner Members	<ul style="list-style-type: none"> • Keep your details up to date. • We are here to help with any questions you might have. • A guaranteed pension payable for life which is backed by law. • Benefits payable on death. • Understand the impact of any changes in legislation
Employers	<ul style="list-style-type: none"> • You have a responsibility to provide employees with information about the LGPS. • You need to understand how the Scheme works and the effect of any changes that happen. • The LGPS is a valuable benefit for members and you need to help educate them to understand the changes and the impact. • You have a responsibility to inform the Fund of any changes to scheme members circumstances. • You have a responsibility to provide the Fund with data in respect of your employees and to comply with your LGPS employer responsibilities as outlined in the Fund's Administration Strategy.
Potential Members including those who have opted out	<ul style="list-style-type: none"> • Your employer shares the cost - In fact, employers pay much more than scheme members. • Life cover of three years pay - from the second you join. Unlike other forms of life insurance, there's no medical - it's open to all. • If you are a taxpayer, you get tax relief on all your contributions - even on extra payments you make to top up your pension. • At retirement, you will receive a pension for life with an option to convert some of it to a tax-free lump sum. • There are no hidden fees or charges - you simply pay a percentage of your pay. • Two years of membership is you need to build up a pension. If you leave before retirement, you will still receive a pension when you do retire. • No investment risk - you get a guaranteed package of benefits which are backed by law. • Protection for you in case you have to draw your benefits early because of permanent ill health. There is also protection for your loved ones, in the form of dependant pensions if you die. • If you are struggling financially, you can pay lower contributions to still build up benefits. • After you retire, your pension will go up with inflation, protecting you from rising prices.
Dependent Members	<ul style="list-style-type: none"> • Keep your details up to date. • We are here to help with any questions you might have. • A guaranteed pension payable for life which is backed by law.

Section 1: Communicating with Contributing Members

Pension Forecasts

Annual pension forecasts are made available on our secure online portal 'mypension'. Notifications to inform members their forecasts are available to view are issued by email and text. If we don't hold either of these details then the notification will be made by post.

Pension Planning Newsletter

At least once a year we will publish a newsletter for members to keep them informed about changes in the pension scheme that may affect them. The newsletter is not produced at fixed times and is driven by the timeliness of the content. Newsletters will be digital by default.

We live in a digital age, and while paper versions will be made available on request, our digital by default position recognises that the vast majority of our members now have access to the internet. We will also produce online only newsletters aimed at different age groups. Young people who may have recently joined the scheme and older members planning for retirement are interested in different aspects of the scheme and may warm to a different style of delivery. The type of publication being issued will determine the intended audience; however we will be looking to target younger members, mid-life and pre-retirement.

In addition to pension scheme content we aim to include lifestyle articles and ensure the newsletter is interesting to read and visually stimulating.

Presentations

We deliver group information sessions in members' places of work. These are provided on demand in conjunction with employers. We deliver more specialist sessions for members affected by issues such as a public services transferring to a private organisation. We also participate in induction, mid-life and pre-retirement courses, which are organised by a number of our employers and providing there is sufficient interest. In 2022 we began to offer these sessions to our members from our Oakwell House location with the option to attend in person or join the live stream and watch online. Afterwards recordings of the sessions were added to our website as a point of reference for any members who couldn't make the sessions but would find the information useful.

Section 2: Communicating with Deferred Benefit Members

Deferred Benefit Statements

Annual deferred benefit statements are made available on our secure online portal 'mypension'. Notifications to inform members their statements are available to view are issued by email and text. If we don't hold either of these details notification will be made by post.

Your Past is Your Future Newsletter

Annually we produce a newsletter. The main purpose is to keep in contact with our deferred benefit members. A deferred beneficiary is usually no longer in employment within the pension fund and as they are not in receipt of their pension and without regular contact it is easy to lose touch. The content of the newsletter will inform members of changes to the pension scheme and include lifestyle articles of interest. There is no fixed time for issue but it is usually linked with the annual report summary and deferred benefit statements.

Newsletters will be digital by default. We live in a digital age, and while paper versions will be made available on request, our digital by default position recognises that the vast majority of our members now have access to the internet.

Section 3: Communicating with Pensioner Members

Retirement Insight

Bi-annually we produce a newsletter, the main purpose is to inform retired members about issues that affect them such as annual cost of living increases. This newsletter is generally produced at fixed times in the spring and autumn to coincide with pensions increase and annual report content. Newsletters are digital by default. Paper versions are issued on request. All new pensioners will be digital by default, with the exception of members who aren't online, and request a hard copy.

The spring issue of the newsletter will be issued with the members' April pay advice and P60.

Payslips

Payslips are available on our secure online portal 'mypension'. Members who retired before July 2019 will receive a payslip if their net pay varies by more than £5.

Section 4: Communicating with Employers

Support and Engagement

SYPA has dedicated staff to assist employers with all aspects of their pension duties. Our engagement officers will be employers' first port of call for any staff training and presentation requests for both Payroll and HR issues to help them administer the scheme effectively. They will also offer a range of presentations to scheme members to help them understand their pension benefits. Handover meetings will be provided from the point employers are admitted to the scheme, where our team will explain the services we provide and cover the responsibilities of the employer. We offer seminars aimed primarily at topical and administrative issues as well as one to one meetings to help with any issues that may arise.

Employers Pensions Information Centre (EPIC)

The authority provides a central information centre where registered employers are able to access a whole range of information online including news and links to important documents. EPIC also provides statistical information to assist employers in understanding their scheme responsibilities.

Employer Web

The authority also provides secure access to relevant scheme member information and allows employers to upload monthly data submissions and produce retirement quotes. Employer web is also used as a platform to contact and query member data securely.

Employer Newsletter

These are created quarterly by our Support and Engagement team for our employers and create a range of useful links and information for them and their employees. These are also used to promote any upcoming sessions, forums, focus groups or online training.

Employer Focus Group

Twice a year we hold Focus Groups with Employers who have volunteered to take part. During the session our Support and Engagement team discuss up and coming issues that the Employers need to be aware of and discuss the best approach and communications methods for these. The Focus Groups also allow Employers the opportunity to request the creation of resources that will go on to our website or that can be passed on to their employees to limit queries on common issues. The sessions are collaborative and allow a mix of different size Employers to come together and help each other solve problems and give suggestions. The outcomes of the discussions are then posted in the Employer Newsletter so that Employers who don't attend get the information as well.

Section 5: Communicating with all audiences

Our Website (sy pensions.org.uk)

This is the scheme members' website which is an information source on all aspects of the scheme. Simply set out with quick links and a comprehensive A-Z, the website also contains booklets and publications together with the link to our secure online portal (mypension).

Business of the Elected members is available on our website under the 'About Us' section. Here you will find the calendar of Authority meetings along with agenda, minutes and reports. This area of the website also provides access to the live links that will allow you to watch Authority meetings as they happen or to catch up with the recording later.

Secure Online Portal - 'mypension'

Members can register to gain access to their secure online account. Once registered for mypension it's a great way for members to keep track of their pension account, view and amend personal details, make and update death grant nomination details as well as active and deferred members having the facility to produce retirement quotes. Annual benefit statements will be available for both active and deferred members. For retired members monthly payslips and P60s are available to view.

Special Requests

We offer an appropriate choice of communication methods to help ensure that no one in our scheme is disadvantaged. To assist members with special needs when communicating we can make arrangements to have a signer or interpreter present should a member wish to attend an information appointment. We can also provide communication material in large print, audio CD and braille.

Literature

The main point of reference for members to find out about the key aspects of the LGPS is our Employee Guide. This is supported by a range of literature, on the various aspects of the Scheme.

Annual Fund Meeting

This event is usually held in October or November. The AFM is an opportunity to meet the Chair/Vice Chair of the authority and senior management face to face. Presentations usually focus on fund performance and topical events followed by questions from attendees. To allow members who aren't able to attend the AFM we will record the meeting and upload the event to our YouTube or Vimeo account.

By Telephone - Customer Centre

The Customer Centre is the main communications channel between members/employers within the Authority. The Customer Centre will play an important role in delivering a reliable customer experience on a daily basis. Members and employers can contact us by telephone which is prominently advertised on all our literature.

Email

Members can contact us by email which is prominently advertised on all our literature. A secure e-mail service is in operation to allow personal information to be included in e-mail responses. We also do targeted promotional mailings to our members to promote any in person or virtual pension information sessions that our Support and Engagement or Customer Services teams may be running.

Pensions Information Service

A comprehensive pensions information service on pension matters is provided by the Authority both in person and by video call. Appointments are made online at <https://www.sypensions.org.uk/Contact/Appointments>

Text Messaging

Our preferred method of communication is email however in the absence of an email address, where appropriate we will use text messaging. SMS messages are ideal for reminders and simple instructions and announcements.

YouTube and Vimeo

Video recording opens the door to new opportunities to interact with members. Recording of events such as the AFM or member information sessions will be uploaded to YouTube and Vimeo to give members who couldn't attend on the day a chance to view the meeting.

Social Media

In 2022 the UK had over 57.8 million people using social media. Our aim is to connect with as many of our members as possible, strengthening relationships and engagement. We currently have a Facebook page and members or partner organisations can follow us on Twitter and LinkedIn. Our audience on our platforms continue to grow and our platforms are seeing more engagement with our campaigns and posts.

Annual Report

Provides a comprehensive report on the authority's activities throughout the preceding year.

Meetings/Presentations

Our people are available to attend meetings and deliver presentations on a range of topics upon request. We are currently running a full diary of events in person and online from our Oakwell House office.

External Press Releases

Throughout the year we will issue press releases about our investment activity, any recruitment of new advisers and any other items of interest to the general public or to other organisations we work with. These will be sent out to a number of news agencies online and to the local press.

Customer Centre

Getting customer service right in an organisation, and continually improving it, is a long term commitment. Our customer centre will be the first point of contact for all scheme members and employers whether it's by telephone, email, letter or live chat. The main aim is to provide excellent customer service whilst promoting our online services.

The Customer Centre will welcome feedback. We will resolve any problems to the best of our ability, we will stop them being repeated and learn lessons. We will measure our performance making sure we measure the right things, making sure it's relevant and taking any necessary action. Benchmarking will be a key part of our measurement programme.

Live Chat

Our members can speak to our Customer Services team online using our Live Chat function getting help with a range of pension queries as for some this is more convenient than contacting us by telephone. It is also more accessible for those with hearing difficulties.

Customer Centre Contact Details

Telephone: 0300 303 6160

Email: customerservices@sypa.org.uk

Internal Communications with Employees

Internal Communications with Employees We are currently working on plans to improve our internal communications at South Yorkshire Pensions Authority. We have a range of digital tools at our disposal and are looking at how we can use these effectively to communicate with all departments across the organisation now that we have moved to a hybrid working style, with employees spending part of the week working at home and the rest in the office.

The table below sets out the methods we use to communicate with our different audiences, the frequency of these and whether they are digital or not.

Communication Type	Digital	Non-Digital	Website	Frequency	Intended Audience
Annual Pension Forecasts	✓	✓ (Notification by post if no email or mobile number held)	✓	Annually	Active
Member Newsletters	✓	✓ (Only for pensioners who requested a paper copy)	✓	Biannually for Pensioners (<i>Spring / Autumn</i>) Annually for Active and Deferred members	All Members (one newsletter for each group)
Employer Newsletter	✓	x	✓	Quarterly	Employers
Pension Presentations	✓	✓	✓		All Members
Deferred Benefit Statements	✓	✓ (Notification by post if no email or mobile number held)	✓	Annually	Deferred
Payslips	✓	✓ (Only for pensioners who retired with a different print rule in place)	✓	Monthly	Pensioners
Ad hoc Newsletters	✓	✓	✓	As required	All
P60s	✓	✓ (If members request a paper copy)	✓	Annual	Pensioners

Key Risks

We are currently working on plans to improve our internal communications at South Yorkshire Pensions Authority. We have a range of digital tools at our disposal and are looking at how we can use these effectively to communicate with all departments across the organisation now that we have moved to a hybrid working style.

The key (potential) risks to the delivery of this Strategy are outlined below. The Head of Pensions along with other officers will work with the Pension Committee and Pension Board in monitoring these and other key risks and considering how to respond to them.

Staffing

- Lack or reduction of skilled resources due to difficulty retaining and recruiting staff.
- Staff absence due to sickness.
- Failure to communicate with staff members in relation to scheme changes.
- Lack of decision making due to loss of Pension Committee/Pension Board member.

IT and Infrastructure

- Lack of adequate software or IT solutions - particularly in the digital communications area.
- Unable to deliver an efficient service to pension members due to system unavailability or failure.

Legislation and change in external markets/environment/employer

- Significant external factors, such as national change, impacting on workload.
- A major change to the LGPS legislative environment.
- Significant increase in the number of employing bodies causing strain on day-to-day delivery.

Communication errors

- Issuing incorrect or inaccurate communications.
- Failure to maintain scheme employer database leading to information not being sent to the correct person.
- Lack of clear communication to scheme employers, scheme members and pensioners.

Costs

All costs relating to this Strategy are met directly by the Fund (unless indicated).

Approval, Review and Consultation

This Consultation and Communications Strategy was approved on June 2023 by the South Yorkshire Pensions Authority members. It will be formally reviewed every two years and updated by the Committee at least annually or sooner if the communications arrangements or other matters included within it merit reconsideration (including if there are any changes to the LGPS or other relevant Regulations or Guidance that need to be considered).

Next full review January 2025

Further Information

If you require further information about this Consultation, Communications and Engagement Strategy, please contact:

Joanne Webster Service Manager - Customer Services, Tel: 0300 303 6160, email: jwebster@sypa.org.uk

Becci Illidge Communications Officer, Tel: 0300 303 6160, email: rillidge@sypa.org.uk