

# Communications Working Group

## AGREEMENTS AND ACTIONS

Wednesday 29 January 11am to 2pm

Location: Eaton-Cockell Room, 18 Smith Square

---

### 1. Apologies and introductions

#### Present

Amanda Jupp (**AJu**) (Surrey Pension Fund)  
Andy Hemming (**AH**) (West Midlands Pension Fund)  
Ben Altoft (**BA**) (Avon Pension Fund)  
Guy Hayton (**GH**) (Merseyside Pension Fund)  
Jacinta Wilmot (**JW**) (Environment Agency)  
Jenny Gregory (**JG**) (East Riding Pension Fund)  
Jenny Wylie (**JWy**) (Oxfordshire Pension Fund)  
Karen Brooker (**KB**) (Kent Pension Fund)  
Karen Thomas (**KT**) (Gwent (Torfaen) Pension Fund)  
Kath Meacock (**KM**) (Flintshire Pension Fund)  
Lorraine Bennett (**LB**) (LGPC Secretariat)  
Mandy Judd (**MJ**) (Hampshire Pension Fund)  
Martin Griffiths - **Chair** (Staffordshire Pension Fund)  
Rachel Abbey (**RA**) (LGPC Secretariat)  
Sharon Grimshaw (**SG**) (LGSS)  
Sinead Nicholson (**SN**) (NILGOSC)  
Stuart Duncombe (**SD**) (West Yorkshire Pension Fund)  
Taryn Mutter (**TM**) (LPP)

#### Dialled in

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

#### Apologies

Matthew Allen - vice-chair (Cornwall Pension Fund)  
Pamela Bruce (Lothian Pension Fund)  
Rebecca Clough (Shropshire Pension Fund)

**Digital engagement subgroup:** Jenny Gregory, Becky O'Shea, Kath Meacock.

**Transfer video subgroup:** Andy Hemming, Jacinta Wilmot, Sharon Grimshaw, Rebecca Clough.

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

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

The group introduced themselves for the benefit of new members. Two members have recently left the group – Cheryl Platts from Buckinghamshire and Steve Makin from Tyne and Wear Pension Fund. The Chair thanked them both for their contributions to the work of the group.

---

# Communications Working Group

## 2. Actions and agreements from last meeting held 15 October 2019

All actions from the last meeting are either complete or will be covered in later items on the agenda.

---

### 3. Member website

- Feedback on the member videos

The group was positive about the member videos which have been used for pension staff training, at employer forum events, by employers for inductions and included by employers on websites and intranet sites. Most funds were in the process of updating their member websites and will embed the videos or include links to them on the relevant pages.

SN confirmed that they had identified which parts of the videos and voice-over need to be changed in order to produce a version for Northern Ireland. The Environment Agency is also in the process of producing a fund-specific version.

- Member videos – statistics

Very few views of the Welsh language versions so far, but MJa confirmed that Welsh employers had given good feedback.

The videos page on [lgpsmember.org](http://lgpsmember.org) has had 5694 views since it was loaded in November. Last month saw an 11% increase compared to the month before.

The videos are hosted on Vimeo by Your Landscape – the statistics from Vimeo tell us how many times each video has been played, wherever the video link is embedded. The total number of plays so far is 2,945. The most played videos are:

1. How your pension works – 778 plays
2. What is a pension? – 662 play
3. Life after work – 638 plays

- Transfer video

LB asked the group whether they agreed with the recommendation made by the LGP Committee to produce a video for members who are thinking about transferring out. The group agreed that this was a hot topic at many administering authorities. The group supported the proposal and wanted the video to be in the same style as the videos that have already been produced. The video should include warnings about pension scams, but should also cover the rules that govern transfers, such as the requirement to complete a transfer at least a year before Normal Pension Age.

AH, JW and SG volunteered to form a subgroup to assist in the production of the videos.

## Communications Working Group

- Web content accessibility – update on NILGOSC accessibility audit  
SN gave an update on the accessibility audit that Shaw Trust completed on the NILGOSC website. She had shared the report with the group in advance of the meeting. Only a sample of webpages were audited, but all pages will need to be corrected in response to the findings. Because correction would take a significant amount of time and expense, NILGOSC plan to introduce a new website instead. This will ensure they provide an accessible site as soon as possible.

The report identified problems in the use and consistency of headings, contrast levels and the labelling of form fields. It is not a requirement that old pdfs are made accessible, but some funds felt that including inaccessible documents could cause reputational damage and intended to make all information and resources accessible.

There were mixed views about automated tools, such as [Silktide](#) (and their free Nibbler tool) and [Siteimprove](#), that can check the accessibility of websites. There were concerns that these methods did not pick up all issues that would be identified in a comprehensive manual audit.

The group was reminded that accessibility is also about readability, and the importance of plain English was emphasised.

Responsibility for accessibility on secure member portals was discussed. We understand that the next Heywood upgrade will make changes to improve accessibility. Civica clients reported they had received some non-committal responses to queries they had raised about accessibility.

**Action 1:** LGA to include reminders about accessibility rules in future bulletins leading up to the September deadline for compliance.

---

#### 4. Digital engagement

- Update from subgroup  
The purpose of the subgroup is to collate funds' experiences of encouraging members to sign up to a secure member portal. JG will collate examples of best practice and successful initiatives and feed back to the group. JG confirmed that Cheryl Platts shared her experiences before changing jobs.

Most funds provide annual benefit statements online but are at the early stages of making other documents available via the portal. Member presentations provide an opportunity to encourage and assist members to sign up. The group noted that employer engagement and involvement was useful in encouraging members to sign up.

**Action 2:** The subgroup agreed to share information with JG by the end of May. JG will provide an update at the next meeting in April.

## Communications Working Group

- Possible benchmarking of self-service registrations  
The group was asked whether they support the introduction of benchmarking for numbers members who have signed up for the member portal. The number of active, deferred and pensioner members who have signed up could be monitored, as well as how many had accessed the system in the previous 12 months.

**Action 3:** LGA to include an article on benchmarking of self-service registrations in a future bulletin to gauge interest. Item will be picked up again at the next meeting to discuss if and how to take it forward.

---

### 5. Annual Benefit Statements (ABS)

- update on the ABS project looking at data items to be included
- software suppliers' compliance  
The new version of the ABS technical guide was published on 28 January 2020. The most significant change is the recommendation to include actuarially reduced figures for members who were over age 55 on 31 March. We expect Heywood to raise this issue at regional user groups to find out the level of support. We encourage funds to use the AHA system to register their support for this development. We understand that this option can be delivered by the Civica system, but it is not part of the 'standard' package.

**Action 4:** RA to include a section in the January bulletin asking funds to raise this issue with their software suppliers.

---

### 6. Standardised member letters

- Is there an appetite for producing standardised template letters?  
SG has attended Plain English training with other funds and asked whether there was merit in working together to produce plain English templates of standard letters centrally. SG offered to liaise with the Plain English Campaign to get any documents certified.

The group did not think that producing a full template letter would be beneficial. The group supported the idea of producing paragraphs covering the main points of a certain topic that funds could adapt to fit their own processes and documentation.

LB noted that the LGA already provide letter templates for new starters in the Automatic enrolment sample letters document, and for aggregation quotes. It was acknowledged that the aggregation letters need updating.

A subgroup was formed to consider transfer out quotation letters and aggregation quote letters.

**Action 5:** The group to share any aggregation letters that are different from the LGA templates with RA, particularly any innovations or inclusions that have reduced queries or improved response rates. It was noted that Leicestershire have made considerable progress in this area and they will be approached to share their templates with the LGA.

## Communications Working Group

**Action 6:** LGA to work with the subgroup to produce transfer out quotation letters in line with the timings set out in the 2020 work plan.

---

### 7. Regional communication groups

- feedback from regional groups  
The regional group has not met since the last CWG meeting. Other regions are in the early stages of setting up similar groups to work together on communications.
- 

### 8. Communications work plan

- Individual funds' communication plans  
Topics on the agenda for 2020 for individual funds include:
  - targeted communications for members who have not completed an expression of wish form
  - a campaign to inform opted out members about the benefits of the scheme and programmes to encourage sign up to self-service
  - a campaign of cases studies – have you thought about paying extra? Have you considered the 505/50 section? etc.
- Progress review  
Although timings have slipped slightly, we are on track with the Communications plan. The LGA team will be concentrating on producing accessible version of guides, with particular emphasis on plain English. Member guides and the member website will take priority, but work is also needed on the [www.lgpsregs.org](http://www.lgpsregs.org) and [www.lgpsboard.org](http://www.lgpsboard.org) sites.
- items for next year's plan  
The group agreed that the Workplan for 2020/21 will include:
  - digital engagement group
  - standardised letter templates
  - exit payment cap – likely to be progressed by the new Government. It has also been suggested that Clawback will re-surface
  - Cost cap and McCloud – Jeff Houston plans to issue a template communication aimed at scheme members. Most funds have not received any queries about this legal challenge and feel that communicating with all members may lead to more concern among members and queries.
  - Transfer video
  - Employer training
  - Ill health briefing note for employers – to improve understanding of employer responsibilities

**Action 7:** SD to share WYPF's draft version of the employer briefing note on ill health with the group. Subgroup to comment on the note.

---

### 9. AOB

- CWG membership terms of reference  
LB reminded the individuals are members of the group, membership is not by fund. When someone leaves the group, the LGA will decide who will replace

## Communications Working Group

them. They will consider who is on the waiting list and geographical representation on the group when making that decision.

- Transfer forms  
The LGA plan to re-write the transfer discharge forms to improve the format and introduce plain English
- Disclosure requirements  
LB forwarded a copy of the disclosure requirements document before the meeting.
- Retirement living standards  
PLSA launched the Retirement living standards in autumn 2019. They have asked the LGA to promote them in the LGPS.

JW noted that the Environment Agency already to link to these on their website. GH said that Merseyside have introduced these in retirement planning courses.

**Action 8:** LB to forward the information and tools from PLSA on promoting the retirement living standards.

---

### 10. Next Meetings

Wednesday 29 April 2020

Wednesday 1 July 2020

Wednesday 7 October 2020