



COMMUNICATIONS & ENGAGEMENT STRATEGY

2018



Communications & engagement strategy

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1 Introduction to Greater Manchester Pension Fund (GMPF)

Who are we?

GMPF is a regional pension fund that administers the statutory Local Government Pension Scheme (LGPS). It is managed by Tameside Metropolitan Borough Council and is the largest of 89 LGPS funds across England and Wales.

Employees of all local and joint authorities in the Greater Manchester area and of many other public bodies normally have access to the LGPS*. Employees of a wide range of other bodies that provide a public service can also join the LGPS where certain circumstances apply.

GMPF currently has over 680 employers whose employees pay into the pension fund.

What do we do?

Our job is to look after the LGPS pensions of all those employees who are, or have in the past, paid into GMPF. We do this in line with the LGPS regulations and other relevant legislation. This includes calculating and paying benefits as well as investing the money we receive in contributions.

We currently have over 368,000 pension fund members whose pensions we are looking after.

What are our core values?

These eight values are the most important to us:

CORE VALUES	
Excellence	Being focussed on our stakeholders' needs and providing excellent customer service
Legality	Fulfilling our statutory obligations
Collaboration	Working well with others and capturing the benefits of teamwork
Social responsibility	Encouraging good pension provision amongst our members and wider, and contributing to debate and decision making in the wider pensions landscape
Efficiency	Demonstrating value for money, continually learning and looking to improve
Prudence	Being prudent in our decision-making and taking a long-term view
Accountability	Having good governance and clear lines of accountability
Transparency	Being able to demonstrate that we are an open, transparent and trustworthy organisation

** Members of these bodies normally have access to the LGPS unless they are eligible to be a member of another public service pension scheme, such as the teachers, police officers, firefighters, civil service or NHS pension schemes.*

2 The purpose of our strategy

Why have we developed a communications and engagement strategy?

- To demonstrate our desire to communicate and engage effectively and cost efficiently with all our stakeholders
- To help us to develop a clear and transparent plan of how and when we intend to communicate and engage with people
- So we know exactly how we are going to measure progress and evaluate the success or otherwise of the activities we do
- For all stakeholders to be clear about our core values and key messages, so that these can be portrayed when we deliver our service or when services are delivered on our behalf
- For stakeholders to be clear about the timescales GMPF is working to when delivering its communication and engagement objectives
- To ensure we fulfil any statutory obligations we have that relate to communications and engagement work
- To have a clear understanding of the resources and budget needed to deliver our communication and engagement objectives
- To enable our plans to be scrutinised and challenged effectively, in order to drive improvements and increase performance

What is our strategy intended to deliver?

- Clarity about the communication and engagement activities we will do and what we intend to achieve
- Objectives that give a clear and consistent message about what we do and our values
- A means of encouraging the use of, or development of, industry leading methods and strategies for effective communication and engagement
- Value for money

What are our specific areas of focus and why?

Electronic communication and the use of modern technology

In order to:

- Meet member expectations
- Deliver efficiency savings
- Deliver cost savings

Reflecting the view of those with an interest in GMPF's investment activities

In order to:

- Help us to develop in our role as a responsible investor
- Ensure we are able to identify important ethical or environmental issues that may arise
- Identify other opportunities or benefits that are important to our stakeholders

3 GMPF stakeholders

Who are our stakeholders, and what are their key needs or interests?

GMPF stakeholders can generally be grouped into one of the six categories in the table below:

STAKEHOLDERS AND THEIR NEEDS OR INTERESTS		
Stakeholder category	Some examples	Key needs or interests
GMPF members & prospective members	Contributing and deferred members, pensioners and dependants	<ul style="list-style-type: none"> ● Information about their pension benefits or potential pension benefits ● Information to help them make decisions about their pension provision
GMPF employers & prospective employers	GM Local authorities, the National Probation Service, academies, colleges	<ul style="list-style-type: none"> ● Information that helps them to carry out their employer pension duties effectively ● Details about the financial implications of fund / scheme membership
GMPF Trustees and Local Board members	Nominated council representatives, nominated employee representatives	<ul style="list-style-type: none"> ● Information to enable effective decision-making ● Clarity on key risks and responsibilities
GMPF officers	The Director of Pensions, pensions officers	<ul style="list-style-type: none"> ● Understanding and knowledge in order to carry out their role effectively
Partners and contractors	IT software suppliers, investment and legal advisors, investment managers	<ul style="list-style-type: none"> ● Knowledge of our priorities and values, in order to reflect them in the work they do for us
Other external bodies	Government departments, independent financial advisors, the Local Government Association	

4 Our strategy

What are we setting out to do and achieve?

- To have clear branding, a strong image and be a recognised organisation within the field of pensions
- To develop a cohesive and consistent approach when creating our communications tools and materials
- For our communication materials to always be clear, concise and easy to understand
- For all partners and associated parties to understand our priorities and values
- To ensure all GMPF officers understand our key messages and approach, in order to communicate with our stakeholders effectively
- To fulfil and build on our statutory obligations
- To keep stakeholders up to date with any changes that might affect them
- To publicise our successes
- To establish routes for us to feedback to recognised industry partners
- To ensure our members have a good /increased understanding of the value of their pension pots and to promote pensions as a valuable benefit
- To encourage and support members to make well-informed decisions and be effective in their pension planning
- To respond to members everyday questions and queries in a convenient way and at a convenient time for them
- To reach all the people or groups that we want to communicate and engage with
- To establish where there are gaps are in member knowledge and understanding so we can look to fill them
- To put in place mechanisms that enable us to address 'topical' issues in a timely way
- To look to dispel some of the myths that surround pensions
- To facilitate easy links to other organisations that members might find useful or want to get in touch with
- To establish the tools and information employers would find useful to help them to support their employees on pension matters
- To support employers in fulfilling their employing authority role to achieve value for money, excellent customer service and / or efficiency savings
- To support employers to respond to pension issues / consultations that affect them or their employees
- To facilitate communication between stakeholders (for example, where LGPS employers wish to communicate with other LGPS employers)
- To be able to demonstrate any stakeholder events we hold are effective and value for money
- For all our processes, procedures, or other routes of communication to enable people to effectively scrutinise what we do and provide feedback to us
- To build clear mechanisms and tools for evaluating success in to our procedures and embed that approach into everything we do
- Have an 'invest to save' approach, whereby we give due focus to tasks or opportunities that will provide clear benefits going forward

What is the timeframe to which we are working?

This strategy is intended to be in place from April 2018 until March 2020. It will be reviewed every six months and will be updated or replaced if needed.

What are the key messages that we want to get across?

About GMPF

There are five key messages that we want to get across about GMPF when we are communicating and engaging with our stakeholders based on our core values. These are:

- We put our members at the heart of everything that we do
- We always do our best, being polite, open and honest
- We work to high standards
- We listen to views, opinions and feedback and use them to improve
- We demand value for money when using resources and spending budgets

About the LGPS

There are four key messages that we want to get across to members and prospective members about the LGPS and their pension. These are:

- Planning for retirement is important
- Your LGPS pension is a valuable benefit
- It is important to let us know if you ever change address
- It is important to complete a death grant nomination form and keep it up-to-date
- Your feedback is valued by us

How are we going to measure progress and success?

We intend to measure success through regular assessment and by obtaining feedback from stakeholders. All the objectives we set will form part of our implementation plan and the methods of measuring success will be included in the plan.

How will we encourage continual improvement?

We believe that we already have a well established culture of continual improvement. However, we will look to put training and mechanisms in place that ensure continual improvement remains embedded in our ways of working.

5 Implementation plan

Key objectives

Nine key objectives have been set. These are to be achieved between April 2018 and March 2021. Achieving these objectives will improve and strengthen the communications and engagement activities that GMPF already do and will help to ensure the aims listed in section 4 are met. Details of these objectives are as follows:

Objective 1	Implement, develop and promote the new online Member Self Service module, 'My Pension'
Stakeholders	All contributing, deferred and pensioner members
What it achieves	Members are able to check and update their own personal data, perform benefit estimates and access documents, such as their annual benefit statement and payslip
Main benefits	Improves the access members have to their pension benefits and related information; reduces printing and postage costs
Resource	Internal team and Aquila Heywood
Timeframe	From April 2018 to March 2020
Measure success by	Take-up levels; feedback to the Helpline; on-line survey
Budget required	Costs have been built into the budget for 2018/19
Status	Module implementation complete. Development and promotion ongoing

Objective 2	Review and develop GMPF's complete website offering
Stakeholders	All stakeholders
What it achieves	All stakeholders being able to easily access the information and tools that they are looking for
Main benefits	Improves the access stakeholders have to information
Resource	Internal team and external partner
Timeframe	From September 2018 to September 2019
Measure success by	On-line survey, focus group
Budget required	TBC
Status	In progress

Objective 3	Implement a GMPF 'App' for mobiles and tablets
Stakeholders	All contributing, deferred and pensioner members
What it achieves	Will enable GMPF to notify members quickly and easily of any information or updates that might affect them (such as pay date reminders, website updates, news items and so on) as well as providing key information about their benefits (such as their normal retirement date)
Main benefits	Improve the access to information for members; helps to keep members engaged
Resource	Internal team and Aquila Heywood / external partner
Timeframe	From September 2018 to March 2021
Measure success by	Take-up levels; feedback to the Helpline; app survey
Budget required	TBC
Status	In progress – initial investigation work started

Objective 4	Develop a suite of member learning and engagement tools
Stakeholders	All prospective, contributing, deferred and pensioner members
What it achieves	All stakeholders being able to learn in an easy and engaging way about LGPS pension benefits and what choices they have to manage and improve their benefits package
Main benefits	Improves the access stakeholders have to information and increases member understanding
Resource	Internal team and external partner
Timeframe	From January 2019 to March 2021
Measure success by	On-line survey, focus group
Budget required	TBC
Status	Not yet started

Objective 5	Explore and expand telephony software functionality
Stakeholders	All stakeholders
What it achieves	Maximising available functionality to enable all stakeholders to obtain the information they need quickly and easily
Main benefits	Improves service levels; improves management information
Resource	Internal team and external partner
Timeframe	From April 2019 to March 2020
Measure success by	Telephone survey, focus group
Budget required	TBC
Status	Not yet started

Objective 6	Review and improve all member literature
Stakeholders	All prospective, contributing, deferred and pensioner members
What it achieves	All members being provided with information in an accessible and engaging way; to be able to clearly understand the information being provided and, if applicable, know what steps they need to take
Main benefits	Improves the member understanding and subsequently reduces the number of second stage or third stage queries received
Resource	Internal team and external partner
Timeframe	From January 2019 to March 2020
Measure success by	Surveys, focus group
Budget required	TBC
Status	Not yet started

Objective 7	Implement a new program of member consultation, including member focus groups
Stakeholders	All prospective, contributing, deferred and pensioner members
What it achieves	Obtaining current and topical feedback on areas of service delivery
Main benefits	Increases understanding of what is important to members; will provide vital information to inform what member related key performance indicators should be in place; will provide important feedback on new initiatives and developments
Resource	Internal team and external partner
Timeframe	From April 2018 to March 2020
Measure success by	Surveys, focus group
Budget required	TBC
Status	Ongoing

Objective 8	Put in place a program for obtaining feedback from employers, including employer focus groups
Stakeholders	GMPF employers and prospective employers
What it achieves	Obtaining current and topical feedback on areas of employer support
Main benefits	Increases understanding of what is important to employers; will provide vital information to inform what employer related key performance indicators should be in place; will provide important feedback on new initiatives and developments
Resource	Internal team and external partner
Timeframe	From April 2019 to March 2020
Measure success by	Surveys, employer focus group
Budget required	TBC
Status	Not yet started

Objective 9	Develop a suite of employer learning and engagement tools
Stakeholders	GMPF employers and prospective employers
What it achieves	All employers being able to learn in an easy and engaging way about the LGPS, employer responsibilities and have an understanding of what the impact of their decisions may have on liabilities
Main benefits	Improves the access employers have to information and increases employer understanding
Resource	Internal team, Aquila Heywood and other external partners
Timeframe	From January 2019 to March 2020
Measure success by	On-line survey, focus group
Budget required	TBC
Status	Not yet started