



West Midlands Pension Fund
Communications Strategy Statement 2015
April 2015

Background

The West Midlands Pension Fund is one of the largest pension funds in the United Kingdom with over 275,000 members, in excess of 450 individual employers and over £11bn invested. To maintain a high level of customer service success, it is vital for the Fund to understand the needs of our customers as well as their views on the services and products that we provide. This will assist in maintaining the high level of industry reputation that the Fund holds. The Fund achieves this understanding by ensuring regular dialogue with our stakeholders is established and maintained as part of day-to-day business.

In April 2006, the Local Government Pension Scheme (LGPS) regulations were amended to state that each pension fund administering authority is required to prepare, publish and review regularly its communications policy statement.

This document outlines the Fund's communications policy in line with that requirement and covers the following categories in our regular communication activity:

1. Communicating with scheme members;
2. Member self-service (the web portal);
3. Communicating with members' representatives;
4. Communicating with prospective members;
5. Communicating with employing authorities;
6. Customer engagement strategy.

1. Communicating with scheme members

Annual Benefit Statement

An annual benefit statement is made available online for all active and deferred members who are contributing to the Fund or have not received payment of their deferred benefits at the previous financial year. These statements are made available through the Fund's web portal self-service facility. Benefit statements can be issued in paper form on written request.

If there is an instance where a benefit statement cannot be made available, due to incomplete or inaccurate data, we will notify members of this by letter.

wmpfonline.com

The Fund maintains an extensive online resource at wmpfonline.com containing information about the scheme and the details about the current activities of the Fund. There are also links to other relevant partner organisations.

Scheme literature

An extensive range of scheme literature is produced and updated by the Fund for all categories of member. Copies of scheme literature are made available at the Fund's website, wmpfonline.com.

Twitter account

The West Midlands Pension Fund has a twitter account (@wmpfonline) where we provide short information updates.

Telephone helpline – 0300 111 1665

A dedicated low-call rate telephone customer service telephone line is provided for scheme members and is publicised in all outgoing communications.

Pension roadshows

The Fund stages information events in members' places of work. In addition to these roadshows at district council offices, additional events can be held on request, particularly when there may be organisational changes occurring which have pensions implications.

Pensioner pay advice slip and Club Together

All fund members in receipt of a pension receive a combined pay advice slip and P60 in April of each year. In the months of May through to March, we will only send a pay advice slip when there is a variance of £10 in their gross or net payment. For scheme pensioners that are paid quarterly and annually, the Fund will issue a pay advice every time a payment is made (June, September, December and March).

Scheme pensioners can also register to use the Fund's web portal application where pay advice information can be viewed electronically and printed at any time following the payment date.

Mailed with the April combined pay advice slip / P60 is a lifestyle newsletter called Club Together. **Club Together** is provided by Paymaster (1836) Limited on behalf of the Fund.

2. Member self-service (the web portal)

An online portal gives members secure access to their Local Government Pension Scheme (LGPS) records.

The facility provides members with the opportunity to update with their personal details, ask questions about their benefits, view annual benefit statements and run pension estimate calculations. Members in receipt of pension are also able to view and change UK bank details via the portal.

3. Communicating with members' representatives

Materials available to members are also available on request to their representatives or through wmpfonline.com.

4. Communicating with prospective members

Scheme booklet and website

Upon appointment with their employer, all prospective scheme members will be provided with a link to the Fund's website where they can access scheme booklets. The website also provides information in order that members are able to make an informed decision about contributing to the Local Government Pension Scheme (LGPS) and how to opt-out of the scheme.

Corporate Induction Courses

Fund officers will attend corporate induction events in order to present to prospective scheme members the benefits of joining the LGPS.

Trade Unions

We work with the relevant trade unions to ensure the scheme is understood by all interested parties. Training days for branch officers can be provided upon request, and efforts will be made to ensure that all pension-related issues are communicated effectively with the trade unions.

5. Communicating with scheme employers

eNewsletter

An electronic newsletter, entitled Employer's Briefing Note is issued on a bi-monthly basis to all employers. This is used to communicate the activities of the Fund and inform of any regulatory changes which may impact on the employer's function or their members' pension benefits.

wmpfonline.com and web portal

The Fund maintains a dedicated area of its website for scheme employers containing news, learning materials and other electronic resources.

Each employer can request to join the Fund's web portal. This allows them secure access to the membership details of their current employees. The portal provides employers with the ability to make changes to member records including working hours and personal details. The web portal also provides the facility to calculate early retirement estimates and any associated early retirement costs.

Dedicated Telephone Helpline - 0300 111 6516

A dedicated low-call rate employer customer service line was introduced during in 2010. This allows the Fund to respond to employer generated telephone calls at peak times.

Annual General Meeting and Mid-Year Review for Employers

The Fund invites each employer to our annual general meeting each winter. This event is used to communicate strategic issues, performance, legislation changes and triennial valuation matters. In addition to this the Fund also holds a similar employer event each summer where employers are kept up-to-date with important issues through presentations and roundtable discussions.

Employer Peer Group

A group consisting of a cross-section of Fund employers meet quarterly to provide feedback on the communication initiatives planned by the Fund for fellow employers.

6. Customer Engagement Strategy

In addition to this document, the West Midlands Pension Fund also publishes a Customer Engagement Strategy.

The document aims to detail:

- who are our customers?
- what is customer engagement to the West Midlands Pension Fund?
- when should customer engagement be considered?
- what types of engagement activities do we undertake?
- how do we use the outputs from customer engagement activities?
- how do we feed back to our customers results and actions from their engagement with us?

The document provides some principles for customer engagement for the West Midlands Pension Fund and as we aim to tailor our strategy to individual customers the document should be viewed as a guide and not as an exhaustive list of engagement activities.

Our Customer Engagement Strategy is updated annually and is available from wmpfonline.com