



**HAMPSHIRE**  
PENSION FUND

# Hampshire Pension Fund (HPF) Communication Policy Statement



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## Introduction

We are committed to engaging with our stakeholders clearly and concisely. This policy sets out how we will do that effectively, using the most appropriate method considering the target audience's needs.

The five key stakeholders we have are:

- scheme members;
- prospective scheme members;
- employing authorities;
- Pension Services' staff and
- other bodies including the Pensions Fund Panel and Board, Scheme Advisory Board, and prospective employing authorities.

We aim to provide a high-quality service to all our stakeholders. Employers and scheme members can find our statement of service standards on our website.

# Method of communication

We aim to provide all communications electronically where possible.

We use the following for electronic communications:

- Member Portal – provides members with secure access to their specific pension details and allows them to complete various forms and upload certain documents.
- Employer Hub - allows employers to access records for their employees and notify us of changes.
- Pension Services website – provides information about the scheme, details of how members can manage their pension choices, a news feed and other resources.
- Secure emails – to notify members when communication is available through the Member Portal and to respond to queries.

Although electronic communications provide rapid access and a secure means of sharing personal information, we recognise that it is not always the most suitable method of contact for stakeholders. Where appropriate, we will also share information by other means, such as:

- in writing;
- in an alternative format, such as large print or Braille.





## Joint Pension Fund Panel and Board

Hampshire has a Joint Pension Fund Panel and Board which is responsible for ensuring:

- that we comply with the LGPS (Local Government Pension Scheme) regulations and any other legislation relating to the governance and administration of the LGPS;
- that we satisfy the requirements of The Pensions Regulator;
- effective and efficient governance and administration of the scheme.

Members may find further information and contact details for this committee on our website, including meeting agendas and minutes.

<https://www.hants.gov.uk/hampshire-services/pensions/joint-pension-fund-panel>



## Communication with all stakeholders

### Helpline

Our helpline service offers telephone support during office hours. We aim to answer 90% of incoming queries without the need to refer to our operational teams. If a question is directed to an operational team, we ensure that a call back is made within one working day.

If a scheme member telephones us, then a summary of the conversation is noted on the member's record.

### Email

We have a general email address for all queries [pensions@hants.gov.uk](mailto:pensions@hants.gov.uk). We include a link to our customer satisfaction survey at the end of every email. The survey feedback is reviewed weekly and used to improve our service where appropriate.

# Our communication with scheme members

We communicate with our members in a variety of different ways.

## Our Member Portal

We actively encourage all members to register for our Member Portal:

<https://upmliveportal.hants.gov.uk>

This secure Portal allows members to view the pension details we hold for them and offers a wide range of facilities. We regularly upgrade the Portal and add more facilities for members to use.

We email members registered for our Portal to:

- advise when key documents such as their annual benefit statement become available;
- inform of regulation changes;
- notify when letters regarding their benefits are available to view.

All members can use the Portal to:

- send us a secure message;
- update personal details such as name, address and marital status;
- securely upload documents such as birth/marriage/civil partnership certificates;
- add or amend an 'expression of wish' for payment of a death grant;
- complete a membership option form on joining the LGPS.

In addition, pensioner members can:

- update their bank details;
- securely view or download their P60 and payslips;
- view tax code changes.

Active and deferred members can also use the Portal to:

- view their annual benefit statements;
- complete a retirement declaration form;
- obtain a retirement estimate.

## **Our website**

Our website <https://www.hants.gov.uk/hampshire-services/pensions> offers extensive information about membership of the LGPS and scheme regulations, as well as forms and guides for members and links to other relevant organisations. It is regularly updated and offers a news feed for topical information.

Our annual report and the most recent Hampshire Pension Fund valuation report are all available on our website. The website also provides members with information on all aspects of our scheme governance, including details of our Pension Fund Panel and Board, our Fund investment strategy, our Responsible Investment Policy and all our policies relating to the scheme's administration.

We regularly update the website to comply with the accessibility regulations, and we welcome feedback from any member who is experiencing problems with accessing the information on this site. We then work to improve the site or provide information in a different format.

The website provides access to our customer satisfaction survey, where members can leave feedback or register complaints or compliments about our service.

## **Correspondence**

Most of our communication with members is electronic, either through our Member Portal or secure email. However, correspondence relating to bereavement and pension estimates is sent by mail.

If we hold a member's email address, we will email to advise when a letter or document is available for them to view through the Member Portal.

However, if we cannot communicate electronically, we send the information in writing to the member's home address.

If a member wishes to opt-out of electronic communications and to receive paper copies instead, we ask that they put their request to us in writing. This enables us to update their records and ensure they receive paper documents.

We also send paper documents to any member living in a country where our website and Member Portal are unavailable.

We can communicate with members in a specific way on request, for example, in large print or Braille.

All emails sent contain a link to our satisfaction survey to encourage feedback from members.





### **Benefit statements**

We make our annual benefit statements available to all members through our Member Portal. If we hold an email address for a member, we email to advise that the statement is available to view on the Portal.

Members can opt-out of this online service and receive paper statements instead.

All statements include explanatory notes, and members are advised where to find a more detailed explanation of their statement on our website.

### **New members**

We ask employers to signpost all new members to our Member Portal, where they will find personal pension information and a membership option form to make choices regarding previous LGPS membership. If they have previous pension benefits, which are not in the LGPS, they are directed to the pension transfer booklet on our website.

### **Pension saving statements**

By 6 October each year, we send a pension saving statement to any member who may be affected by the annual allowance tax limit. This statement is also available to view through the Member Portal.

### **Pensioner payslips, P60s and annual newsletter**

All payslips are available to our pensioners through the Member Portal. If a member has paid income tax during the preceding year, a P60 will also be available through the Portal by the end of May. The member can either view or download copies of their payslips and P60. A pensioner newsletter is added to the Member website every year in March or April.

If we hold a pensioner member's email address, we will send an email to advise when their April payslip is ready to view and when the May payslip and P60 will be available. This email will include a link to our pensioner newsletter.

Pensioner members can opt out of electronic communications by putting their request to us in writing. We will then send paper copies of their April and May payslips, P60 and our annual pensioner newsletter. We send these documents to any member living in a country where our website and Member Portal are unavailable.

### **Declaration of pension entitlement**

We need to verify a member's continuing entitlement to receive pension payments:

- every year, for pensioners that live overseas;
- whenever a pensioner payment or mail is returned to us.

We are gradually rolling out a facility to carry out this checking through our Member Portal, using biometrics for identification and verification. In some countries, we are unable to offer this technology. When a member does not use our Member Portal or lives in a country where our biometric identification facility is not provided, we post a paper form to obtain the necessary verification.

# Our communication with prospective scheme members

## Website

Our website contains extensive information about the LGPS in a dedicated 'About the Scheme' section, which explains the scheme's benefits and regulations. The website provides information about the governance of the Hampshire Pension Fund, including policies, details of the Pension Fund Panel and Board and investments.

## Via employers

We provide relevant information about the scheme to employers and ask them to ensure that eligible staff know the scheme benefits and their pension options.





## Communication with our employers

- We communicate with employing authorities in various ways to help them meet their responsibilities as scheme employers.

### **Website**

Our website has a dedicated section for employers. It includes technical information, details of training courses, the latest employer news and an Employer Manual which contains details of procedures and employer responsibilities.

The website offers access to our Employer Hub. Employers are asked to register for this service which enables them to view or amend details of their own employee's records, submit forms to us or provide member estimates, depending on their level of access.

## **Correspondence**

We send a regular electronic newsletter, “Pensions Matters”, to employing authorities to keep them up to date with the latest regulation changes and proposals, as well as any changes in administrative processes.

We also send ad hoc email communications under the heading “Stop Press” to advise employers of any changes or information they should be aware of or would find helpful.

Copies of “Pensions Matters” and “Stop Press” emails are added to the employer section of the website.

## **Employer training**

We offer employer training workshops on various topics, in addition to dealing with queries via email or phone.

In addition, Pension Services will work with employers who have individual training needs offering targeted training on request or when a need is identified.

## **Administration strategy**

Our administration strategy is an agreement between the Hampshire Pension Fund (HPF) and the scheme employers and is accessible through our website. It sets out the roles and responsibilities of both our employers and the HPF and indicates the level of service that HPF and the employers will provide each other.

## **Pension Fund Annual Employers’ Meeting (AEM)**

We invite all our employing authorities to attend the Pension Fund Annual Employers’ Meeting. As well as providing information on issues such as the annual report, scheme changes and investment managers’ performance results, the Annual Employers’ Meeting provides opportunities for employers to put questions to the Joint Pension Fund Panel and Board or those presenting.

## **Employer meetings**

We hold employer liaison meetings throughout the year with key employers or those requiring additional support. All employers may request a meeting with us. We also have six-monthly meetings with employer focus groups and attend established employer forums such as the Payroll Officers' Group.

## **Reports and accounts**

We send each employer an electronic copy of the annual report and accounts. We publish an updated Statement of Investment Principles and make it available to employers within three months of the Joint Pension Fund Panel and Board approving any significant amendment.

## **Valuation report**

We send employers the provisional outcome and full actuarial report on the triennial valuation when they are available.



# Our communication with Pensions Services staff

We ensure that our staff are kept up to date with regulatory changes to the scheme and updates in our software and our processes so that they can continue to administer the scheme effectively and offer a high-quality service to all stakeholders. Our staff communications include:

- Staff webpages - providing a range of information about regulations, topical pensions news, administrative details, our charity events and access to our suggestion box.
- “Pensworld” - a weekly email bulletin to staff which provides updates on regulation changes, internal processes, software updates and other news.
- Suggestion box – available online to allow staff to submit suggestions which may improve our processing and customer service.
- Employer contact information database – to ensure that staff know the names of authorised employer contacts with whom they can share information.
- Meetings – regular meetings are held across the whole section and within individual teams to share information on new regulations, processes, and other news.
- Staff training includes a structured development programme for new staff, regular training and workshops and the support of staff studying for professional qualifications.

# Our communication with other bodies

## **Members' representatives**

We provide information to members' representatives on request where we hold an appropriate authority.

## **Joint Pension Fund Panel and Board**

The Joint Pension Fund Panel and Board receive reports from the Director of Corporate Operations, which cover the administration, governance and investments of the Pension Fund, such as reports:

- from internal audit;
- regarding the performance of the Fund's investment managers;
- on changes to scheme rules.

In addition, the Panel and Board have created a Responsible Investment sub-committee to consider how Environmental, Social and Governance (ESG) issues impact the Fund's investments and make recommendations to the Panel and Board.

## **Prospective employing authorities**

We provide prospective employers with information about the responsibilities and costs of joining the scheme. New employers are invited to employer training sessions.

## **Local Government Association (LGA)**

The LGA provide support for LGPS pension funds and employers in England and Wales and represents their interests to central government and other bodies.

We access many resources on the LGA website and take an active role in their Communications working group and their Technical group, allowing us to discuss regulatory changes and communication issues with other LGPS Funds.

## **Investment managers and Fund actuaries**

We have regular meetings with the Fund Managers who invest the monies belonging to Hampshire Pension Fund (HPF). We also meet the HPF actuaries who measure and value the assets and liabilities of the Fund and set employer contribution rates to keep the Fund in a good position.



# Hampshire Pension Fund publications

Publications matrix										
	Format Available			Available to:					Published	Reviewed
	Portal	Website	Paper	Prospective members	Current members	Deferred members	Pensioners	Employers		
<b>Scheme information</b>	No	Yes	On request	Yes	Yes	Yes	No	Yes	Always available	As regulations change
<b>Employer manual</b>	No	Yes	No	No	No	No	No	Yes	Always available	As regulations change
<b>Reports and accounts</b>	No	Yes	On request	Yes	Yes	Yes	Yes	Yes	Annually	Annually
<b>Benefit statements</b>	Yes	No	On request	No	Yes	Yes	No	No	Annually	Annually
<b>Pension Saving Statements</b>	Yes	No	Yes	No	Yes	No	No	No	Annually	Annually
<b>Pensioner newsletters</b>	No	Yes	On request	No	No	No	Yes	No	Always available	Annually
<b>Service Standards</b>	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Always available	Annually
<b>Complaints and appeals process</b>	No	Yes	On request	Yes	Yes	Yes	Yes	Yes	Always available	Annually

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