

### **Draft Communications Strategy 2019/2020 – Annex 3**

This strategy details how Orbis will communicate with scheme members and employers, and is to be used in conjunction with each Fund’s Communication Policy Statement.

For any queries relating to this strategy please contact the Pensions Manager at Surrey County Council, County Hall, Kingston Upon Thames, KT1 2DN or at [myhelpdeskpensions@surreycc.gov.uk](mailto:myhelpdeskpensions@surreycc.gov.uk)

#### **Vision**

*The outstanding provider of exceptional LGPS administration*

#### **Mission**

*Excellent service from expert people and an engaging self-service which our members and client partners value*

#### **Objective**

*To educate our customers to a level where they become self-sufficient and can access the information they require or know where the information can be obtained. Engagement with the operational team would therefore be restricted to the more complex queries, and life changing events which requires expert knowledge*

<b>Method of Communication</b>	<b>Media</b>	<b>Frequency of Issue</b>	<b>Method of Distribution</b>	<b>Audience Group</b>
New Starter Welcome Letter – Contractual Enrolment (Legislative)	Electronic	2 months from date of joining the scheme	E-mail	New Members
New Starter Welcome Letter – Automatic Enrolment/Re-Enrolment (Legislative)	Various	1 month from notification	Employer	New Members
Member Scheme Guide	Electronic or Paper Based by Request	Always Available Online	Fund Website or Member Self Service	All Members
Leaver Rights and Options (Legislative)	Electronic	2 months from date of notification	E-mail	Members leaving the scheme

Transfer In Quotation (Legislative)	Paper Based or Electronic	2 months from date of request	Letter to Home Address or Member Self Service	Active Member
Transfer Out Value (Legislative)	Paper Based or Electronic	3 months from date of request	Letter to Home Address, Member Self Service or IFA	Deferred Member
Retirement Quotation (Legislative)	Paper Based or Electronic	2 months from date of request	Letter to Home Address or Member Self Service	Active and Deferred Member
Retirement Benefits (Legislative)	Paper Based or Electronic	1 month from date of retirement if on or after NPA, or 2 months from date of retirement if before NPA	Letter to Home Address or Member Self Service	Active and Deferred Member
Dependants Benefits (Legislative)	Paper Based	2 months from date of notification of death	Letter to Dependants Home Address	Dependant Member
Annual Benefit Statement (Legislative)	Electronic or Paper Based	By 31 August each year	Member Self Service or Statement to Home Address	Active and Deferred Member
Pension Saving Statements (Legislative)	Paper Based or Electronic	By 6 October each year	Letter to Home Address or Member Self Service	Active Member
Pensions Increase Letters	Electronic or Paper Based on Request	By 30 April each year	Member Self Service or Letter to Home Address	Pensioner Member
Pensioner P60s	Electronic or Paper Based on Request	By 31 May each year	Member Self Service or Letter to Home Address	Pensioner Member
Active Member Newsletters	Electronic or Paper Based on Request	By 31 August in line with ABS	Member Self Service or Letter to Home Address	Active Member

Deferred Member Newsletters	Electronic or Paper Based on Request	By 31 August in line with ABS	Member Self Service or Letter to Home Address	Deferred Member
Pensioner Member Newsletters	Electronic or Paper Based on Request	By 30 April in line with Pension Increase Letter	Member Self Service or Letter to Home Address	Pensioner Member
Presentations/Roadshows	Face to Face	Twice per year per Fund	Via Fund	Active Member
Drop In Sessions	Face to Face	As Requested up to a maximum of 2 per year per Fund	Via Fund	Active Member
Customer Satisfaction Survey – Member	Electronic	Annually	E-mail	All Members
Changes in Legislation	Electronic	Within 10 working days of notification of change	E-mail to Fund	Pension Fund
Employer Training	Face to Face	As requested or arranged by Orbis	Via Fund	Scheme Employer
Employer Guides	Electronic	Always Available Online	LGPS Regs Website	Scheme Employer
Employer Newsletters	Electronic or Paper Based on Request	Monthly Updates/April and September Newsletters	E-mail to Fund Contacts	Scheme Employer
Customer Satisfaction Survey - Employer	Electronic	Annually	E-mail	Scheme Employer

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