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Ohio Police & Fire Pension Fund 2014-2015 COMMUNICATIONS PLAN

The Ohio Police & Fire Pension Fund (OP&F) seeks to clearly and effectively communicate information regarding benefits, the organization, its policies, decisions and accomplishments to each of its audiences. The Communications Plan has been developed to work in concert with OP&F's mission, vision and core values.

Successfully explaining how OP&F provides a secure pension and valuable retirement options for Ohio's police officers and firefighters is the prevailing concern in the development of each element of the OP&F communication plan. It is also important to communicate information that allows our members to make informed decisions concerning their benefits.

Each publication and news item from OP&F is also available on the organization's full-service website, www.op-f.org. The Communications Group regularly examines the site to see how it can best present the increased amount of information available online and offer members and other visitors a user-friendly resource for OP&F news and information.

COMMUNICATION WITH MEMBERSHIP

Goal: Communicate OP&F news, policy and rule changes, and enrollment and benefit information.

Actions:

- Members Report newsletter. Mailed to all OP&F members quarterly and available online at www.op-f.org, it includes news, information and updates on Board of Trustee actions, upcoming events, legislative news, important dates and relevant retirement news.
- Member Guidebooks. Eight guidebooks are printed as needed that describe in detail the specific programs and options available to members as they consider retirement. The books are designed to be included in a pre-retirement information packet available from the Member Education Group and at a series of annual pre-retirement seminars conducted throughout the state. Each book is available for viewing online and can also be ordered online at no charge.
- Targeted Communications. Specific strategies may be implemented for major benefit changes and communicating significant changes to OP&F's health care offering.
- The OP&F website: The organization's internet site, op-f.org, along with the intranet site EmployeeNet, continues to be a source of information for OP&F members, staff and interested parties. In addition to all OP&F publications being placed on the site, the most up-to-date forms and news is also available.
- Customer Service talking points. Facts and talking points concerning specific OP&F issues are immediately produced, approved and distributed to the Customer Service Group for use in answering member inquiries. The talking points are used to help ensure a consistent and accurate message from the organization.

- Social Media. The Board of Trustees has discussed the potential advantages and disadvantages of launching a Facebook page or participating in other social media platforms. At this time there are no plans to have a social media presence. However, the issue will be re-evaluated periodically.

Goal: Provide membership with courteous, quality and responsive customer service when contacting OP&F.

Actions:

- Customer Service Department. OP&F's Customer Service Group responds to OP&F members and others contacting OP&F via the toll-free phone numbers. Functions include answering questions concerning recent mailings or correspondence from OP&F, sending requested forms, brochures or guidebooks, and assistance with password maintenance for those using the Member Self-Serve Web feature.
- Questions from Members. OP&F provides active members, retirees, survivors, dependents and other interested parties with a variety of methods to ask questions or voice concerns. Inquiries may come in the form of letters, e-mails or phone calls. Questions not immediately answered by a customer service representative are passed along to the department that can best answer the inquiry. Letters and e-mails sent to OP&F and not addressed to a specific person or department are answered promptly by the Communications Group.

Goal: Provide outreach services to members who wish to explore available benefit options.

Actions:

Outreach services are provided through meetings sponsored by OP&F, as well as employers, unions and professional associations.

- Member Counseling. The OP&F Member Education Group schedules member counseling sessions at OP&F upon request. OP&F benefits counselors are responsible for conducting on-site pre-retirement sessions, calculating pension estimates, and servicing walk-in members. Service, disability and DROP counseling sessions are scheduled daily.
- Approaching retirement. Each year a series of pre-retirement seminars are scheduled across the state and designed to describe pension benefits available to members and their family members upon retirement. Members who are eligible for retirement or DROP enrollment within five years receive an invitation with detailed information about these seminars.
- Online retirement presentations. OP&F has produced five retirement video presentations designed to inform members about the retirement process, and the forms and information required to process retirement applications. The presentations are available on the OP&F website. These five narrated presentations include: Normal Service Retirement; Entering into the Deferred Retirement Option Plan (DROP); Retiring from DROP; Service Commuted Retirement; and Age and Service Commuted Retirement.

LEGISLATIVE COMMUNICATION

Goal: To effectively communicate information concerning the status of OP&F accomplishments, actions, initiatives, and financial status to our legislative audiences.

Actions:

A variety of reports, presentations, Board of Trustee reports, letters and news releases are distributed to the Ohio General Assembly, State leadership and the Ohio Retirement Study Council in an effort to make these audiences aware of decisions, accomplishments and actions at OP&F. OP&F's legislative consultant is used for all specific communication efforts to members of state leadership and the General Assembly.

- Annual reports. Two specific annual reports are published by OP&F for each fiscal year (January 1-December 31). Each report is mailed to state leadership as well as interested parties, and is also available on the OP&F website. Members may receive a copy of the report on request.
 - Comprehensive Annual Financial Report. Prepared each year to aid interested parties in assessing the status of the organization, the report includes a report from an independent auditor, a discussion and analysis by OP&F management, the financial statements of the organization and historical data. An investment section contains an investment report, a portfolio summary and OP&F's investment policy and guidelines. Also included in the report are significant actuarial data and results.
 - Popular Annual Financial Report. The popular annual report highlights investment performance, revenues, expenditures and assets of the organization, along with reviewing significant accomplishments and initiatives of OP&F and its mission.
- Reporting on Board of Trustee meetings. The monthly Board Report newsletter is distributed to the members of the Ohio General Assembly, leadership and interested parties outlining all Board of Trustee actions and is a comprehensive review of executive and policy actions. The report also includes an investment portfolio update. The Board Report is also available online following the monthly Board meetings.
- OP&F Guide for Elected Officials. OP&F produces a publication specifically for members of Ohio's General Assembly and state leadership. The booklet concisely describes OP&F membership, benefits and funding information, along with OP&F contact information for legislators.
- Presentations and Testimony. When appropriate or upon request, OP&F delivers testimony or presentations to select legislative committees, local labor organizations and local government agencies.
- Meeting with Legislators and Leadership. In coordination with OP&F's legislative consultant, OP&F communicates information, progress or concerns on current or pending issues and legislation to individual legislators or elected officials. OP&F's Executive Director attends each meeting of the Ohio Retirement Study Council (ORSC). Communication with ORSC staff occurs on a regular basis. OP&F also routinely provides information and background to help legislators best serve their constituents when responding to questions or requests.
- Legislative Update. Beginning in 2013, OP&F produced this quarterly one-page newsletter specifically targeted to elected officials. Content is designed to highlight OP&F successes and also to accurately communicate the system's funding progress.

MEDIA RELATIONS

Goal: Ensures the Statehouse reporters, major daily newspapers, major business publications and investment trade publications are aware of OP&F's response to the challenges facing public retirement systems and the ability to provide long-term value that achieves positive results for OP&F's membership.

Actions:

- **News Distribution.** News releases and media advisories are distributed to local, state, national and trade media as needed to announce accomplishments, significant Board decisions, policy updates and statements on particular issues concerning OP&F. Each news release is also posted on the OP&F website.
- **Materials.** OP&F creates and distributes information to media both proactively and upon request as appropriate. Materials may include:
 - Fact sheets providing an overview of OP&F, key financial data and benefits information.
 - Publications, such as OP&F's annual report, CAFR and member guide books.
- **Targeted Interviews.** As appropriate, OP&F's Executive Director or Communications Manager is available to conduct interviews with key media to communicate how OP&F continues to work to provide the highest quality in terms of service and information to its membership and the general public.
- **Editorial Boards.** As necessary, OP&F's Executive Director will meet with the editorial boards of the major daily newspapers throughout the state to inform them of OP&F's position on an issue.
- **Response to Media Inquiries.** Incoming media inquiries are directed to the Communications Manager and are responded to in a timely manner. Statements to the media are issued by the Executive Director or by the Communications Manager at the discretion of the Executive Director.
- **Trade Media.** Inquires from investment and financial trade publications are directed to the Communications Manager. The Communications Manager responds after consulting with the Chief Investment Officer, and/or the Executive Director.
- **Response to Media Coverage.** As necessary, OP&F will respond to media coverage by writing opinion pieces and/or a letter to the editor to reinforce accurate coverage and correct any misconceptions.

COMMUNICATION TO EMPLOYERS

Goal: To effectively communicate OP&F rules, policies and benefit plans as they relate to the employers of members.

Actions:

- **Newsletter to Employers.** The *Employer Digest* is mailed to all employers quarterly. The *Employer Digest* includes information designed to help employers with reporting, contribution and compliance issues, applicable federal and state regulations, and OP&F administrative rules. The newsletter is also available online.
- **Targeted Communications.** Specific strategies may be implemented for any potential contribution changes. Targeted letters or publications may be developed to ensure effective communication with employer groups.
- **Employer Education Manager.** The Employer Education Manager is responsible for enhanced communication between OP&F and employers. The position assists employers with contribution reporting issues, interpreting changes to administrative rules and the Ohio Revised Code.
- **Employer Manual.** This publication is used as a reference guide to assist OP&F employers in reporting contributions and submitting the required forms and materials on a timely basis. The manual was re-written in 2007, and is currently being updated. The Manual is also available online. Updated policies and rules are added to the online version of the manual and are also mailed to employers as needed.

- The OP&F website: The website is also a valuable source of information for OP&F employers. Updates to the Employer Manual are available online, as well as all editions of the Employer Digest and forms used by employers.
- Employer Self-Service Payroll Reporting and Payment Program. Communication with OP&F employers continues to emphasize automated payment options available and encourage employers to use these options in lieu of sending paper reports.

COMMUNICATING WITH OP&F EMPLOYEES

Goal: To educate and inform OP&F employees, allowing each to better perform their duties and in turn make OP&F a more efficient organization that better serves its membership.

Actions:

- Employee Newsletter. *All Points Bulletin* serves as the employee newsletter for OP&F and is distributed internally six times annually via an all-staff e-mail and includes links to EmployeeNet, the OP&F intranet site. The publication includes news on events, meetings and other items of interest to employees.
- EmployeeNet. The OP&F intranet site, named EmployeeNet, hosts policies, procedures, publications and information specifically for staff members. Each department has the ability to control the content of its specific area of the site.
- Staff Meetings. All-staff meetings are held monthly in which news and information is announced and employees are informed of achievements or ongoing initiatives.
- OP&F Culture Committee. The committee was organized in August 2009 with the purpose of facilitating more constructive behaviors into the workplace and to increase employee engagement, commitment and communications. Suggestions and results are communicated to all staff on a regular basis.
- SharePoint. Each working group is responsible for posting procedures specific to its function and also “knowledge nuggets” that should be designed to make work processes more efficient.
- E-mail correspondence. Employees of OP&F are regularly informed of organization-wide strategies, accomplishments, opportunities and activities by either the Executive Director, Human Resources or a specific department.

COMMUNICATIONS CONSULTANT

Goal: Use the resources available to address specific communications situations and projects

Actions:

- On an as-needed basis, OP&F will employ the services of an outside professional communications or media relations consultant.