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Ohio Police & Fire Pension Fund 2021 COMMUNICATIONS PLAN

The Ohio Police & Fire Pension Fund (OP&F) seeks to communicate clearly and effectively information regarding benefits, the organization, its policies, decisions and accomplishments to each of its audiences. The Communications Plan is 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 communications 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

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

- 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 (or webinars) conducted throughout the state. Each book is available for viewing online and can 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 news and information for OP&F members, and interested parties. All OP&F publications are on the site, as are the most up-to-date forms.
- Videos: Beginning in 2016, OP&F started producing a series of videos to educate membership and the public about benefits. Currently, seven videos are completed (50th anniversary, Service Retirement, Saving for Retirement, DROP and Disability, Employer file uploads, and Employment at OP&F). An employee orientation video is currently in production. OP&F is also working on employer training to correct common mistakes with payrolls.
- 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. In 2018, OP&F procured the services of Communications Counsel to manage social media on Facebook and Twitter. These were launched in the summer of 2018. In 2019, in

consultation with the Board, it was decided to use Twitter as our main social media tool. The OP&F Facebook page will have a link to the Twitter account and posts to Facebook will be at the discretion of the Board. OP&F also has a YouTube page where our videos are available.

- Streaming Board meetings: When OP&F headquarters were closed to the public during the pandemic, audio from Board meetings were made available by calling a toll-free number. OP&F will continue to assess the demand and ability to provide different remote access to meetings. OP&F monitored the number of individuals who called in when meetings were available remotely by telephone. The first of these meetings available for call in had approximately 100 people joining by telephone (many of whom were OP&F staff). To our surprise, subsequent meetings had very few members of the public use this option. Besides the open monthly meeting held in March 2021, in-person attendance has been less than 10 members. There are currently four bills in the legislature concerning the streaming or broadcasting of pension fund board meetings. Each is unique and they vary in requirements and responsibilities. It would be prudent to postpone any decisions about streaming Board meetings until these bills work through the legislative process.

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

- Customer Service. 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.

Provide outreach services to members who wish to explore available benefit options. 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. Daily counseling sessions are scheduled for service retirement, disability and DROP.
- Approaching retirement. Each year a series of pre-retirement seminars include presentations describing pension benefits available upon retirement. Members who are eligible for retirement or DROP enrollment within five years receive an invitation with information about these seminars. In 2020 and 2021, these annual seminars are webinars, allowing members to participate online without having to travel to locations around the state during the pandemic. The same information is provided during the webinar that always has been available for the traditional 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

To effectively communicate information concerning the status of OP&F accomplishments, actions, initiatives, and financial status to our legislative audiences. A variety of reports, presentations, Board of Trustee reports, letters and news releases are distributed in an effort to make elected officials 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). These reports are now online-only publications, saving OP&F printing and mailing expenses. Each report is emailed to state leadership as well as interested parties, and is also available on the OP&F website.
 - 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 electronically 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.
- 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.

MEDIA RELATIONS

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.

- 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 Director 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 Director and are responded to in a timely manner. Statements to the media are issued by the Executive Director or by the Communications Director at the discretion of the Executive Director.
- Trade Media. Inquiries from investment and financial trade publications are directed to the Communications Director. The Communications Director 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 WITH EMPLOYERS

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

- Newsletter to Employers. The *Employer Digest* is emailed 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. In 2021, OP&F will be transitioning from an emailed quarterly newsletter to a newsfeed that will be emailed as news and items of interest develop.
- 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 a reference guide to assist OP&F employers in reporting contributions and submitting the required forms and materials on a timely basis. The Manual is also available online. Updated policies and rules are added to the online version of the manual and are 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

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.

- Employee news. The *All Points Bulletin* (APB) news feed serves as the source for employee news at OP&F. Each time a news item is posted to the APB area of EmployeeNet an all-staff email is sent to alert employees. The news feed includes information 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. Monthly all-staff meetings are held in which information is announced and employees are informed of achievements or ongoing initiatives.
- OP&F's Work Group Innovation Program. Established in 2018, the program encourages new ideas for processes and procedures to help with efficiency, compliance, consistency, and training. OP&F recognizes that the employees performing the work processes and procedures are often the employees best suited to recognize when it is time for a change or upgrade. The program serves as a conduit to consider and implement ideas from staff, and also recognize the individuals who brought forward the innovation.
- SharePoint. Each working group is responsible for posting procedures specific to its function and information designed to make work processes more efficient.
- E-mail correspondence. Either the Executive Director, Human Resources or a specific department regularly informs employees of organization-wide strategies, accomplishments, opportunities and activities.

COMMUNICATIONS CONSULTANT

Use the resources available to address specific communications situations and projects

- OP&F supplements its internal communications team with outside services as needed.