



THE UNIVERSITY OF BRITISH COLUMBIA

UBC Faculty Pension Plan Communication Strategy

Introduction

The UBC Faculty Pension Plan (FPP) has published this Communication Strategy document to provide an overview of the approaches used by the FPP to meet the communication needs of its stakeholders as well as the main objectives and principles that the communication program strives to achieve. It is also to ensure that the Plan communicates clearly, effectively and in a timely manner with its members.

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Review

This Communication Strategy will be monitored for effective implementation and the content of this document will be reviewed annually. The document will be subject to revision if new initiatives or changes are made to plan communications.

Our Main Objectives

- To communicate the main features and benefits of the FPP to key stakeholders. This includes ensuring members are well informed about changes to the FPP (including changes required by pension legislation) as well as their responsibilities as members.

Our Key Stakeholders

- Eligible Faculty
- Members (Active, Deferred and Retired)

Our Key Principles

- To use simple and plain language when communicating to key stakeholders, where possible.
- To communicate changes affecting the FPP in a timely manner.
- To engage key stakeholders using a variety of communication methods (print, digital, and face-to-face) that take into consideration the varying needs of key stakeholders.
- To evaluate the effectiveness of our communication through direct feedback from key stakeholders, surveys, and metrics.

How do we communicate?

Eligible Faculty

We communicate with eligible faculty in the following ways so that they are aware of their eligibility to join the FPP.

Benefits Enrolment

Eligible faculty can complete their enrolment online through Workday.

Personalized Communications

We email eligible faculty annually to remind them that they are eligible to join the FPP. If we do not have a work email address or the email is undeliverable, we will follow up with a letter mailed to a home address. A follow up email is also sent.

UBC Orientation Hub

Pension information is provided as part of the online orientation given to new employees in their first year of employment.

Website

Our website provides a wealth of information about the pension plan. There is also a menu item on the main navigation called *Overview* for eligible faculty to learn about the FPP and how they can join.

Members

We communicate with our members through a variety of ways:

Welcome Package

Sun Life sends an email to members upon enrolment to welcome them to the FPP. The email provides direction on completing their enrolment and informs them of the different ways to learn more about the FPP such as our website, seminars, and online brochures and publications.

One-on-one Meetings

Members planning for retirement are encouraged to meet with a member services representative at the Pension Administration Office, either in person or through Zoom.

Personalized Communications

Active and deferred members are sent estimates of their retirement income from the FPP to assist them with their retirement financial planning as they approach age 65.

Website

Our website at faculty.pensions.ubc.ca contains comprehensive information about the FPP. The website has been organized so that members can easily find information based on key subjects or by their membership status.

Education Articles

We offer a variety of articles to educate members on important investment and retirement considerations. These articles include:

- Asset Allocation Choices
- Evaluation of Investment Options and Managers in the UBC FPP
- Guaranteed Investment Certificates
- Using Guaranteed Investment Certificates in Your Investment Strategy
- Why Fees Matter

- Canada Pension Plan Retirement Income

Brochures and Publications

We offer a variety of brochures and publications to help members learn about the pension plan, and their investment and retirement options. These brochures and publications are available in print and online format (through our website). The following are some key brochures and publications we offer:

- myMoney @ Work Guide: Welcome to the UBC Faculty Pension Plan
- UBC Faculty Pension Plan Guide
- UBC Faculty Pension Plan Overview
- UBC Faculty Pension Plan Retirement Guide
- UBC FPP RRIF-Type Payments Information Sheet
- UBC FPP LIF-Type Payments Information Sheet
- UBC FPP Variable Payment Life Annuity Information Sheet
- The Variable Payment Life Annuity Explained
- UBC Supplemental Arrangement Information Sheet
- Investment Options Matrix
- Termination Options Matrix
- Retirement Options Matrix

Pension Newsletter

We publish a pension newsletter at least once a year. Members receive the newsletter by email.

Other Newsletters

We also provide pension information and promote events through other newsletters, such as:

- HR Networks
- Healthy UBC
- UBC Today
- Benefits FYI

Webcasts and Videos

Our website hosts a variety of webcasts and videos where members can learn more about the pension plan and how to use the various tools available.

Online Member Account at mysunlife.ca/ubcfpp

Members have access to a secure online website through Sun Life called My Sun Life, which contains their personal pension and beneficiary information, allows them to manage their investments, access financial and retirement planning tools, and view account balances, transactions, and fees.

Email Campaigns

We send emails to our membership inviting them to pension events or to remind/notify them of various member services.

Social Media & Digital Signage

We use the UBC Human Resources Twitter account to promote pension events or distribute information. We also utilize digital signage across the Vancouver campus to promote events such as the Pension Forum and Pension Board elections.

Annual Member Statements

Members receive quarterly statements online through their mysunlife.ca/ubcfpp account. A paper statement is mailed annually at year-end to members unless they opt out.

VPLA members will receive an annual statement by mail in March each year.

Annual Report & Financial Statements

Each year, we post the annual report and financial statements under the Plan Governance section on our website. Members are notified of these documents through their pension newsletter and on our website.

Pension Forum

We invite members to attend the annual Pension Forum where they can learn more about the FPP and the Plan's investment performance and initiatives as well as to ask questions of staff and pension board trustees.

Workshops

We offer two in-depth seminars:

Faculty Pension 101 Seminar

This seminar is for new and current members to learn more about the pension plan. The seminar covers key aspects about the FPP.

Understanding your Retirement Income Options Seminar

This seminar is for members approaching retirement and focuses on the various retirement options available.

Seminars are offered online through Zoom.

Presentations

From time to time, we will make special presentations about the pension plan or on a specific topic such as updates on the investment markets/performance.

Publications Matrix

Communication Material	Print	Electronic (PDF/Email)	Website	Publication Frequency	Review Frequency
Faculty Pension Plan Update newsletter	No	Email	Yes	At least once a year	As needed
Welcome Email	No	Email	No	As needed	As needed
New Member Checklist	No	PDF	Yes	Always available	At least annually
myMoney @ Work Guide: Welcome to the UBC Faculty Pension Plan	Yes	PDF	Yes	Always available	At least annually
UBC Faculty Pension Plan Guide	No	PDF	Yes	Always available	At least annually
UBC Faculty Pension Plan Overview	Yes	PDF	Yes	Always available	At least annually
UBC Faculty Pension Plan Retirement Guide	Yes	PDF	Yes	Always available	At least annually
UBC FPP RRIF-Type Payments Information Sheet	Yes	PDF	Yes	Always available	At least annually
UBC FPP LIF-Type Payments Information Sheet	Yes	PDF	Yes	Always available	At least annually
UBC FPP Variable Payment Life Annuity Information Sheet	Yes	PDF	Yes	Always available	At least annually
The Variable Payment Life Annuity Explained	Yes	PDF	Yes	Always available	At least annually
UBC Supplemental Arrangement Information Sheet	Yes	PDF	Yes	Always available	At least annually
Investment Options Matrix	Yes	PDF	Yes	Always available	At least annually
Termination Options Matrix	Yes	PDF	Yes	Always available	At least annually
Retirement Options Matrix	Yes	PDF	Yes	Always available	At least annually
Education Article: Asset Allocation Choices	No	PDF	Yes	Always available	As needed
Education Article: Evaluation of Investment Options and Managers in the UBC FPP	No	PDF	Yes	Always available	As needed
Education Article: Guaranteed Investment Certificates	No	PDF	Yes	Always available	As needed
Education Article: Using Guaranteed Investment Certificates in Your Investment Strategy	No	PDF	Yes	Always available	As needed

Education Article: Why Fees Matter	No	PDF	Yes	Always available	As needed
Education Article: Canada Pension Plan Retirement Income	No	PDF	Yes	Always available	As needed
Member Services Contact Card	Yes	No	No	Always available	As needed
Annual Report	No	Yes	Yes	Annually	Annually
Quarterly Statements	Yes	Yes	Yes	Quarterly	Quarterly
Yearly Eligibility Letter	Yes	Yes	No	Semi-Annually	Semi-Annually

Privacy and Security

Privacy

The UBC Faculty Pension Plan is required to comply with the *Freedom of Information and Protection of Privacy Act, RSBC 1996, c165 (FIPPA)*, in respect of the personal information in its custody and control.

Sun Life’s privacy policy is available at: <https://www.sunnet.sunlife.com/PSLF/canada/Privacy>

Website and My Sun Life Security

Industry best practices are used in regards to security of the Plan’s website. UBC also has its own Information Security Policies and Standards as per: <http://cio.ubc.ca/security-standards-home/information-security-policy-standards-and-resources>

The member website hosted by Sun Life and their security policy is available at: <https://www.sunnet.sunlife.com/PSLF/canada/Security/How+we+protect+your+information>