

NHS PENSION SCHEME: THE VALUE OF MEMBERSHIP PRESENTATION GUIDE

Talking to employees about their pensions can help staff understand and appreciate the value of the NHS Pension Scheme as part of their overall reward offer. Our [slide pack](#) is designed to help employers explain the benefits of the NHS Pension Scheme to employees.

CREATING YOUR PENSION PRESENTATION

The presentation can be delivered to staff at all stages of their working life, such as during an induction, a pension workshop or a pre-retirement course. The content is divided into ten chapters and can be tailored to suit the needs of your audience and the length of time you have available.

1. An overview of the NHS Pension Scheme
2. The cost of membership
3. How your pension builds up
4. Keeping track of your pension
5. Benefits for your family
6. Leaving the scheme
7. Retiring
8. Saving enough to stop work
9. Ways to increase your benefits
10. Pensions tax

If you are delivering a presentation for staff who have recently joined the scheme, you may wish to focus on chapters 1-5. Chapters 7-9 may be more suitable for a pre-retirement course. The final chapter is suitable for those who are at risk of exceeding or have exceeded the annual and lifetime allowances.

HOW TO USE THE SLIDES

The presentation slides are intended to help the speaker explain key points about the NHS Pension Scheme in the simplest possible language, rather than cover every technical detail about the scheme. Employers may wish to direct staff to the NHS Pensions website if they require more detailed information on a particular topic.

The slides can be delivered to a group of staff in a face-to-face environment or as a webinar. Speakers notes are included on each slide to set out the purpose of each slide, along with pointers or warnings for the speaker.

PLANNING YOUR SESSION

You may wish to consider the following points to help you prepare for your pension presentation:

- Who is best placed within your organisation to deliver the presentation? You might want to run a pilot session to begin with.
- Think about your objectives for running the session. This will also help you to determine who your audience is. How will you evaluate whether it has been a success?

- If you decide to run a webinar, what facilities do you need? Think about how the audience will sign up and access the webinar?
- Think about how long you will need for the session to ensure you can cover everything you want to and allow time for questions.
- What equipment and materials will you need? There are NHS Pension Scheme materials that may be helpful to employees. You may want to provide these electronically following the session.
- Running a session is a great opportunity to promote Total Reward Statements (TRS) and help staff understand their overall reward package for working for your organisation. Perhaps the audience could bring copies of their TRS or access their statements electronically during the session.
- We suggest that presenters make sessions interactive and engaging. This could be through open questions for the group to get the audience thinking.

IMPORTANT CONSIDERATIONS

Disclaimer

It is important to note that the presentation includes a disclaimer at the end which the presenter should read before delivering the material.

Financial advice

It is very important to explain to attendees when using the slide pack that the session is not intended to provide advice. Employers are not authorised to provide independent financial advice by the appropriate bodies. The presenter should make it clear from the outset that the session is intended to be educational only, and individuals should seek their own independent financial advice.

Paying into the NHS Pension Scheme is one way to save for retirement and this is what the presentation focusses on. There are many ways to save for the future, the purpose of the slides is not to compare those different ways. The main purpose of the slide deck is to improve employees' understanding of pension saving, as a way of saving for their retirement.

Accuracy of information

The slides should not be handed to employees without suitable guidance. The content of the slides is correct at the time of publishing but may go out of date in future as the scheme regulations and wider regulations change from time to time.

The slides are not a replacement for NHS Pension Scheme regulations or materials produced by NHS Business Services Authority.

System compatibility and formatting

We have created the slide pack in PowerPoint 2016. Depending on which version of PowerPoint you use and your system, you may need to tweak the formatting. The presentation also contains animations to make the slides more interactive.

Find out more about the NHS Pension Scheme and access further resources at www.nhsemployers.org/pensions.
Tell us what you think about our products and resources at pensions@nhsemployers.org.