



Developing Effective Communication Strategies

PENSION SCHEMES / FUND

| The Task of the Pension Trustees

1

Invest Productively

Sustaining fund assets with strategic and responsible investments.

2

Administer Effectively

Ensuring precise administration and compliance at every touchpoint.

3

Advise Wisely

Guiding stakeholders with transparency, ethics, and strong fiduciaries.



Use Cases in Communication

PENSION SCHEMES / FUND



Finnet

| Case of an Email Gone Wrong

"Was there a way to defuse the mounting tension and avoid a possible rift between the alumna and her former school?"

When communication lack oversight or sensitive topics are broadcast without verification, strategic relationships fracture. Identifying pathways for proactive communication resolution is critical.

| Broken Client Trust

CASE STUDY: LEGAL PRIVILEGE BREACH

Privileged Information Sent to WSJ Reporter

Accidental emailing resulted in broken client legal privilege, with PepsiCo allegedly firing Wilmer Hale as a result of the breach.



| Noninclusive Language Incident



CASE STUDY: INSTITUTIONAL RISK

Email Labelling Latino Students "Mediocre"

The University could have done more to promote an inclusive study environment by using some software for scanning capability to detect sensitive content including keywords around ethnicity, religious beliefs, and other potentially noninclusive expressions.

| Breach of Personal Data

CASE STUDY: PRIVACY STANDARDS

515 Patient's Records Exposed

There are software solutions that offer a suitable alternative with a simple solution that helps to review quickly both email addresses and files attached beforehand.





(B)lead by Example

PENSION SCHEMES / FUND



Finnet

| Conduct with Impeccable Integrity

This supports the fundamental function of leading by example through standards that ensure public trust in both the fiduciaries and the institution or foundation.

Transparency Requirement

Act in the institution's best interests, putting it ahead of your personal preferences and political allegiances. Regardless of how you were selected, as a board member you do not "represent" a particular group of constituents.



Fiduciary Responsibility First

Fulfilling the organizational vision transcends individual interests.

| Independence & Conflicts



SECTION 4.1 FIDUCIARY INTEGRITY

Some board members uphold their gubernatorial or electorate responsibilities as first and foremost on their priority list.

Too many stories can be told of fiduciary boards not exercising independence, which is not to say they are bad board members. It simply means the conflicts need to be managed or they need to be better oriented to their role.

4.2. Questions for Self Reflection

- 1 To whom are you accountable as a board member? To whom else do you feel accountable?
- 2 What personal and professional relationships do you have that could interfere with your ability to make decisions in the best interests of the organization?
- 3 What organizational information is appropriate for you to share with others? What must remain confidential? How do you make this distinction?
- 4 How do your behaviors, actions, and reputation reflect on the institution on whose board you serve?
- 5 What ethical expectations do you have of your fellow board members?

| Breach of Personal Data (Mitigation)

SECURITY STRATEGY

515 Patient's Records Exposed

There are software solutions that offer a suitable alternative with a simple solution that helps to review quickly both email addresses and files attached beforehand.





Tips on Board Communication

PENSION SCHEMES / FUND

| Board Communication Context

OPERATIONAL DEFINITION

What I understand by Board Communication

Board communication encompasses all interactions and information sharing between the chair, board secretary, and board members, including board induction, meeting discussions, and following up on action items, both written and spoken.



| Fiduciary Communications Alignment



CORE PILLARS

What I understand by Board Communication

Board communication encompasses all interactions and information sharing between the chair, board secretary, and board members, including board induction, meeting discussions, and following up on action items, both written and spoken.



The Big 5 of Board Communication

PENSION SCHEMES / FUND

| 1. Define Objectives & Key Messages

- ✓ What do you want the board to know and understand?
- ✓ What are the key outcomes you're aiming for?
- ✓ Craft clear, concise, and compelling messages that reflect the project's values and goals.
- ✓ Ensure consistency across all communication channels.



| 2. Channels and Audiences



- ✓ Who needs to be informed? (e.g., board members, relevant stakeholders)
- ✓ What are the most effective channels for reaching them? (e.g., email, meetings, presentations, reports)
- ✓ Tailor your messages to each audience

| 3. Develop a Communication Plan

- ✓ Outline the frequency and timing of communications.
- ✓ Assign responsibilities for delivering communications.
- ✓ Establish a system for gathering feedback and addressing concerns.
- ✓ Consider using a communication matrix to track progress and ensure coverage.



4. Proactively Engage with the Board



- ✓ Keep them informed regularly, even when there's no immediate news.
- ✓ Provide context and background information.
- ✓ Be transparent about potential challenges and risks.
- ✓ Solicit feedback and engage in open dialogue.
- ✓ Use data and metrics to demonstrate progress and results.

| 5. Key Strategy Elements

- ✓ **Statement of Purpose:** Clearly articulate the project's goals and objectives.
- ✓ **Assessment of Current State:** Provide context for the project and its current status.
- ✓ **Organizational and Communication Objectives:** Define what you want to achieve through communication.
- ✓ **Key Messages:** Identify the core information you want to convey.
- ✓ **Communication Channels:** Determine the best ways to reach your audience.
- ✓ **Work Plan:** Outline the steps you will take to implement the communication strategy.
- ✓ **Success Metrics and Milestones:** Establish how you will measure the success of your communication efforts.

| Discussion & Conclusion

SESSION WRAP-UP

Q&As

Do you have any questions or feedback?

| Thank You



ADDRESS

5th Floor, Crescent Business Centre (CBC), Parklands.
P.O. Box 48179-00100, GPO Nairobi, Kenya



CALL US

+254 719 560656, +254 740 257777, +254 111052230



WEB & SOCIAL

www.finnetrust.com | Facebook/LinkedIn: Finnet Trust