

**Information to Members and Communications Sub-Committee
15 December 2021 (by Teams teleconference)**

Present:		
Julie Huckstep	Member Representative – Chair	JH
Susan Anyan	Independent Pension Specialist	SA
Heather McKenzie	Member Representative	HM
John Pratten	Employer Representative	JP
Jo Cole	TP Engagement Manager (Employer)	JC
Jennie Connelly	TP Engagement Manager (Member)	JCon
Helen Cowan	DfE TPSPB Secretariat	HC
Kathryn Symms	DfE Policy Team Leader Casework, Correspondence & TPSPB	KS
Anna Alderson	DfE Senior Contract Manager and Programme Management Office	AA
Mark Dutson	DfE Contract Management Team	MD
Kelly Elliott	DfE TPSPB Secretariat	KE

	Item	Action
Agenda item 1	<p>Welcome and Apologies:</p> <ul style="list-style-type: none"> JH welcomed those in attendance. The minutes from 22 September 2021 were ratified. 	
Agenda item 2	<p>Actions from the previous meeting:</p> <ul style="list-style-type: none"> SD2/220921 – Deferred Members – Improving website pages – JH invited JCon to update members. JCon explained that TP segment deferred members into two categories (a) those people who have left teaching and (b) those people who are still teaching but have chosen to opt-out of the scheme. They segment based on this for all communications. TP acknowledge work is needed to improve where deferred member information is located on the website and that the word ‘deferred’ is not fully understood. The deferred member video is one of TP’s most viewed videos, and an annual benefit communication is sent out providing more information to the audience. There’s also a deferred member guide which is currently being updated. The engagement plan includes a line on deferred members and how content for users will be improved. Future work will aim to improve navigating ‘deferred’ information on the website and also the site ‘search’ functionality. SA recognised it is encouraging to hear what TP is doing to address the problems. JH mentioned she particularly liked the easy to find fact sheets and forms on the deferred members’ site. She hoped that these would remain in the planned changes. JCon confirmed that the reorganisation would signpost members to these resources. JH sought assurance that the website would highlight where people need to go based on their individual circumstances. JCon agreed TP will aim to do this with the ‘search’ function, enabling users to find the correct content. 	

	<ul style="list-style-type: none"> • IM3/220921 – Transitional Protection communications for the “new scheme” 2022 – <p>JH invited JC to update members:</p> <ul style="list-style-type: none"> • Six case studies are being developed for members’ different circumstances pre- and post-April 2022. These have been shared with SAB, TPARG and focus groups and received positive feedback. These will be uploaded onto the website in January. TP has also provided a version for those people not affected by the changes from 1 April. • Disclosure letters have been drafted and are currently with DfE for review. • The member bulletin in January will include information on the April 2022 change. TP will provide a different bulletin for those still in the final salary scheme. • TP have also been working on a ‘decision tree’ and videos as another type of resource for people to get an understanding. • A new section labelled ‘Scheme Changes’ has been added to the website to make it easier for members and employers to find information on Goodwin, Transitional Protection and Phased Withdrawal. • From April 2022 a lot will need to change on the website and glossary, therefore there is an audit of the site ongoing to identify the various areas which will need updating. • ‘Employer’ webinars were delivered from October, and included in a training email that was circulated to employers. These were well-attended and well-received. Any feedback from the workshops will be incorporated to make further improvements. • The digital team has been working with IT to determine how the options will be best presented to members. In January, TP’s BAU member bulletin will be segmented into FS and CARE messages to ensure messaging is clear. (this bit was deleted by Jo) • • JH prompted that at the last meeting she had raised the issue of retired re-employed members. Sec Note: After the meeting, JC confirmed that one of the case studies covers such members. • JCon noted that a deferred member scenario will be useful, and information will be included in deferred member communications where appropriate. 	
<p>Agenda Item 3</p>	<p>Transitional Protection</p> <p>JC updated Board members:</p> <ul style="list-style-type: none"> • Work is well underway on both policy and operational aspects relating to Transitional Protection. • Communications are moving ahead within the timeline and TP continue to monitor reactions they receive to the communications that they deliver. • The monitoring of website hits and page views shows a consistent steady increase, and TP expect to see a spike when the member bulletin goes out in January and nearer 1 April 2022 date. • HM asked if TP would know if members were from the independent 	

	<p>or state sectors. JC confirmed because it is a public facing site, it is not possible to determine which sector users are from. However, campaigns can be segmented into deferred, active and retired.</p>	
Agenda Item 4	<p>Goodwin</p> <p>JCon provided an update on Goodwin:</p> <ul style="list-style-type: none"> • The new section on the website entitled “Scheme Changes” includes Goodwin (Transitional Protection and Phased Withdrawal). Under Goodwin lies the decision tree tool (using scenarios) and excel calculator which provides figures for users about how their benefits might change. • 32,000 letters per month will be issued for the next 18 months, where possible this will be MPO or email first– MPO is not popular amongst the membership affected by Goodwin. The letter provides all the information required but TP continue to monitor any contact centre queries and correspondence so that communications can be improved where necessary. • JH asked, as Goodwin is now business as usual, whether it could be removed as a standing item on the agenda, and monitored through the quarterly report. Board members agreed. 	IM1/151221
Agenda Item 5	<p>Engagement Plan – Annual Review</p> <p>JC presented slides to give an overview of the engagement plan from both member and employer perspectives. JC highlighted the following points:</p> <ul style="list-style-type: none"> • Each year, TP provide the engagement plan to DfE showing what is to be delivered the following year. The 2022 plan has been a challenge due to the level of activity due to take place. • TP has analysed lessons learned from 2021 and what went well, including data and analytics in terms of email and social media. • Accessibility has been a big piece of work in 2021 and is reflected in the work going forward next year, with all communications being checked to ensure standards are met. • TP has looked at how projects can be integrated within business as usual to get the right message out at the right time. However, the timing of legislation and operational policy requirements impact the timing of the communications. The Pensions Dashboard is another area of work where placeholders on the plan are in place, but ultimately timing – and to an extent, the content of communications - will be dependent on others. • TP segment campaigns around different personas, however, this year, another level will need to be considered around Transitional Protection. • For all campaigns and communications, the Engagement team is mindful that spreading sending products over a number of days prevents operational impact. For example, newsletters and benefit statements can take up to one month to send. • For members, Benefit Statements is a huge campaign that provides an opportunity for members to do “housekeeping”. While looking at their statement they take the time to do other actions, for example, updating contact details. 	

	<ul style="list-style-type: none"> • For employers, End of Year Certificates is a big campaign, as is encouraging the submission of contributions in February and March. Again, these are seen as good opportunities to get other key messages out to employers and to signpost employers to useful training tools. • JC noted that Quarter 1 of 2022 will be extremely busy for her team – Transitional Protection messaging being the most challenging, in particular ensuring the website is accurate from 1 April 2022. Timing of the right messages to the right membership in Q1 - to include eg Multi Factor Authentication (MFA), BAU newsletters, P60s - and ensuring communications do not overlap and clash will be key. • JC explained that MFA is planned to go live in January. Communications need to be timely and provide clarity for members to ensure smooth implementation. Currently members confirm their identity with a PIN number, however, to increase security, there will be three options to authenticate log in, either through google, SMS or email. • JC explained that measuring success is not just the number of “page clicks”. JC’s team look at return of investment on each of their campaigns. For example, JC analyses which persona campaigns work well and why; how many members have opened an MPO account; and whether the team has helped reduce opt out rates. • JH thanked JC for a very thorough presentation. The sub-committee was content with the Engagement Plan for 2022. 	
<p>Agenda Item 6</p>	<p>Institute of Customer Service (ICS) – Internal and External Member and Employer Surveys</p> <ul style="list-style-type: none"> • JCon explained the ICS survey is a service used to benchmark public sector schemes and other wider industries. She presented information collected in February/March 2021, which included internal staff feedback and external feedback from members and employers. • Staff were asked 90 statements about the attitudes and behaviours of working at TP. 173 staff completed the survey (64%) which is the same ratio as 2019 when 191 staff completed the survey. This process was not undertaken in 2020 due to COVID19. • TP scored 65.38, two points above the average for the government department and agencies sector. However, this was 10 points below the average of all sectors, which JCon acknowledged was disappointing, but noted that they were competing with the like of Amazon, Apple and the banking sector. She was also pleased to note that it was six points higher than their own score of 59.72 in 2019. • TP has improved in all areas, with the biggest gains in strategy and culture; scores were lowest in creativity and highest in commitment. Younger staff scored the organisation higher than older staff in every section apart from the creativity and consistency sections. • The highest scoring question was that the senior management 	

	<p>team believe great customer service is important to TP's performance.</p> <ul style="list-style-type: none"> • JCon highlighted further aspects of staff feedback. She noted that staff believe that IT systems (Hartlink) hinder the ability to deliver a high level of customer service. Staff also felt that the workforce should be consulted more on IT developments. • TP also scored poorly on how TP reward staff. To help address this, Capita has brought in a new benefits scheme, i.e. long service awards (5 years to 35 years) which will include a presentation and gift voucher. • Additionally, a 'wall of thank yous' has been created and a weekly email will give chance for employees to recognise someone in the team/organisation. • To address comments about staff training, especially new starters and cross training when people move to new positions, TP now has a training team so this should bring about some improvements. Both internal and external feedback recognises members with ill health, bereavements cases would like to speak to the same person the whole way through the process. • 128 employers and 123 members completed the survey. TP's Score was 65.4 which is down nearly 7 points from 2019 and is lowest in the pension sector. • TP struggled to get a good level of employer and member feedback this time around. It is possible that teachers and employers were under intense pressure because of lockdown. TP kept the survey open for 3 months and whereas over 300 members and 300 employers would normally complete the survey, there were just over 100 this time around. TP hope to see improvements with this next year. • Respondents were most satisfied with helpfulness of staff; competence of staff and product service/range. However, they were less satisfied with speed of handing complaints and the outcome of the complaint. These scores are consistent with 2019. There is work ongoing to improve complaint handling. • JCon showed a "Word Cloud" of the adjectives used to describe their feelings. Members most used words were 'frustrated', 'reassured', 'informed' and 'satisfied' Employer used words such as 'confused', 'frustrated', and 'satisfied'. This highlights the conflicting opinions, which were borne out by 'heat' maps which also show polar views - lots of highs (greens 9/10) and lows (reds ½) demonstrating that TP is offering exceptional service, as well as a service that needs to see improvements. • JCon summarised the main areas identified for further improvement to be quicker response times; more direct contact with TP staff, especially when dealing with complex cases; improving website functionality and navigation; and the accuracy of the online calculators and modellers. • JH queried complaint handling and asked if members or employers were identifiable. JCon confirmed that the survey was anonymous, but reassured board members that TP is currently taking steps to improve the member and employer experience. For example, there was often frustration because a complainant had to tell the 	
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	<p>whole story each time they contacted TP - JH agreed that speaking to one person for complex cases would be much better.</p> <ul style="list-style-type: none"> • SA highlighted some statistics were concerning and asked what the proposal was to address those shortfalls. • JCon explained that TP has an action plan, compiled with the support of DfE and Richard Giles. This includes a series of action points and suggestions for improvements against each area of concern. For example, new staff reward and recognition methods were already in place. The Engagement Team is also planning more creative ways of communicating with members and employers. • SA mentioned that IT systems are perceived as a barrier, and questioned whether this was system constraints or due to staff training. JCon indicated that TP had some technical issues working from home and other IT issues and that they were addressing the issues. • JH requested that TP share their action plan with the sub-committee so that there was assurance that the appropriate actions are being taken. 	IM2/151221-
Agenda Item 7	<p>Quarterly Report - Streamlining</p> <ul style="list-style-type: none"> • It was agreed that, whilst there is some duplication of data in the quarterly report and the dashboard, board members were content with the quarterly report in its current format. • However, it was agreed that annex B – the summary of meetings that have taken place throughout the relevant quarter - would no longer be provided. 	
Agenda Item 8	<p>2022 Forward workplan</p> <ul style="list-style-type: none"> • KS presented the sub-committee's suggested forward workplan for 2022. • The 2022 forward workplan was agreed by the sub-committee. 	
Agenda Item 9	<p>Review of papers</p> <ul style="list-style-type: none"> • JH noted that OM2 was a positive result, and that although OM3 had reduced, this was likely to be because there had been no campaigns in the period. • JH was also pleased to note that digital and webchat take-up was increasing, and noted the new automated options for communicating in this way. • JH also referred the sub-committee to the increase in the number of deferred members' MPO accounts. • JP agreed with JH that the number of accepted schools wishing to leave the scheme was slowing, however he mentioned that the Girls Day School Trust was currently in consultation with staff, and this could mean that 23 more schools may leave the scheme. • AA explained that the OM targets for contract year 11 had been agreed and came into effect on 1 November. The next quarterly report will show performance against those. Some of the targets are more stretching and others remain the same. 	

Agenda Item 10	<p>Agree top 3 issues from the meeting/report to highlight to the next TPSPB</p> <ul style="list-style-type: none"> • Engagement Plan • Transitional Protection communications • Institute of Customer Service (ICS) Survey Results 	
Agenda Item 11	<p>Agree whether any papers or presentations should be shared with the rest of the Board for information</p> <ul style="list-style-type: none"> • Engagement Plan and presentation • ICS presentation 	IM3/151221
Agenda item 12	<p>AOB:</p> <p>It was agreed that the decision on whether the March meeting was by Teams or in person should be delayed until the new year.</p>	
Next meeting	23 March 2022 (by Teams)	

Minutes agreed by Chair: *Julie Huckstep* Date: 6 January 2022

Circulated to sub-committee members on 22 December 2021

To be ratified at the March 2022 sub-committee meeting.