

Engagement March 2017 – April 2017

The purpose of this document is to advise the Information to Members and Communications sub-committee, and the TPS Pension Board of recent key activity on engagement with scheme members and employers so as to assist the Board in its assurance role - in particular in the area of communicating information to members. The report also aims to assist the Board in its strategic role by providing information on specific actions and projects that aim to ensure the administration continues to improve and best serve all stakeholders' needs.

Background

The overarching objective for scheme engagement within the current contract is to keep members and employers informed of scheme activity that affects them through a planned series of communications - understanding, developing and utilising the most effective channels and techniques.

From an employer perspective, this means ensuring that they are aware of and are delivering their obligations as responsible employers through:

- Improving employers' understanding of their responsibilities and providing appropriate support for them to deliver these effectively
- Improving the recognition and appreciation by employers of the value of the scheme to its employees
- Improving the engagement and support that employers provide to members on pension retirement planning

To provide scheme members with a more dynamic, effective and accessible insight into their pension and its benefits, we aim to:

- Increase members' awareness of pensions in general to promote more effective pension planning
- Ensure that the service proactively engages with members
- Ensure members have ready access to information which allows them to understand and make best use of scheme provisions
- Respond to customer feedback to ensure scheme communication continues to evolve, and to drive improvements in customer service.

Initially, guided by the Government's 'Digital by Default' agenda, we have continued the drive towards electronic communications as a main channel for engagement. Through for example: the onlining of P60 and Benefit Statements; the push to increase the number of members with an MPO account; the implementation of MDC from 2018 to streamline the provision of member data etc. These moves help deliver a more up-to-date service and to keep pace with IT developments, allowing us access to better scheme data and to constantly improve the member experience.

The sub-committee's role within this will be to seek assurance that these objectives continue to be met effectively and to provide assurance to the TPSPB that the engagement plan is appropriate and that mechanisms are in place to

ensure the timely delivery of key messages to members.

General communications



- The first phase of the refreshed TPS website was successfully launched on 16 March. Updated content will continue to be rolled out across 2017, in line with the timetable set out below. Monthly updates will be provided to the Department through the Service Delivery Board.

	09/01/2017	16/01/2017	23/01/2017	30/01/2017	06/02/2017	13/02/2017	20/02/2017	27/02/2017	13/03/2017	Public Live	20/03/2017	27/03/2017	03/04/2017	10/04/2017	17/04/2017	24/04/2017	01/05/2017	08/05/2017	15/05/2017	22/05/2017	29/05/2017	05/06/2017	12/06/2017	19/06/2017	26/06/2017	03/07/2017	10/07/2017	17/07/2017	24/07/2017	31/07/2017	Secure COMPLETE		
Plan	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Preparation					█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Additional Items									█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Developments									█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Secure Templates										█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Secure Content																																	
Sweeps																																	

- Telephony services have received increased levels of negative feedback in the period, with accessibility to the call centre being identified as a particular issue. The issues behind this are being addressed and being reported on via the Board’s Service Delivery sub-committee.

Stakeholder engagement

- The latest Teachers’ Pensions Administration Review Group (TPARG) meeting was held on 25 April. Full details of the meeting were shared with Board members in Karen Cammack’s email of 17 May, but in summary, key points discussed by employer and employee representatives included:
 - Feedback was given that members had been experiencing difficulty getting onto the system to view their P60s.
 - Concerns were raised that the KPI measure for telephony performance was below target.
 - The group supported making the opt-out process (from a member perspective) completely online.
 - KPI reporting analysis suggested that the main reason for complaints was around missing service and issues with the opt-out form.
 - The death benefit payments table provided in the report for the group illustrated a rise in member deaths. However, this is a reflection of the revised casework approach which can lead to a number of touch points for a single member death, as a result of the more proactive and supportive service being delivered.
 - It was asked when "Contact us" for employers will be relaunched. TP advised that it is in the IT development queue and is currently being reviewed to ensure it meets employers' needs.

- The delay in issuing service and salary data available to employers will reduce the time employers have to work on Annual Service Return (ASR) data. This change from previous years is due to a change in delivery date of required information from HMRC (as a result of changes to annual allowance).

TP also presented to the group:

- information regarding opt-outs, sharing information resulting from a small sample survey of teachers who opted out, and their employers.
 - information regarding engagement by members with the electronic benefits statement by age group and outlined planned activities.
 - an update on MDC; the group welcomed the increased direct engagement between TP and payroll providers.
 - a short update paper on GMP reconciliation so far and next steps.
 - the Teachers' Pensions Strategic Plan.
4. In March, the Department received a letter from the Welsh Language Commissioner (WLC) confirming investigation into the level of Welsh language guidance and information available on the TP website. This follows a complaint that the site lacks Welsh content, and therefore does not adhere to the DfE's Welsh Language Scheme.

The current administration contract, under which the TP website is operated, reflects the requirements, as they were determined at the time the contract was signed. For example, translation services are offered to any member requesting documents in Welsh, and TP continue to monitor such requests. In total, TP has received 20 such requests since 2012.

The Department has replied to confirm the current arrangements and TP have subsequently:

- Improved visibility of the translation 'offer' to both members and employers on the website
- Committed to publish on the website any guidance which members ask to be translated, which by default will address those documents most in demand.

We await the WLC's response.

Member engagement and campaigns



5. Engagement contract Outcomes 2 and 3

Outcomes	Description	Target	YTD performance
2	Members understand the value of their Teachers' Pension	90%	97.5%
3	Members are actively planning for their retirement	86%	85.7%

Although year to date performance for Outcome 3 is currently below expectations, increases in satisfaction results in recent months (February 84.7%; March 85.7%) suggest that this is on course to achieve the year-end target.

6. At the end of April there were 556k members registered with an MPO account – an increase of 26k members in period.
7. A successful campaign to active and deferred members began in March to promote the availability of online Benefit statements. At the end of April there had been 215k statement views as a result. The campaign will run into May.
8. Automated communications continue to be delivered in line with the 2017 Engagement plan and in general continue to be well received. The limited number of those causing concern for failing to hit their Open or Click through Rates (i.e. those RAG rated as amber or red) are highlighted at Paper 4, along with mitigation actions to address.

Employer engagement and campaigns	→
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9. Engagement contract Outcome 11

Month	Portal Usage	Unique Page Views	Unique Page Views (Emp News)	Unique Page Views (Emp Training)	Emp Bulletin Satisfaction
October	89.41%	10,683	6,855	86.27%	
November	92.58%	10,441	12,452	88.28%	
December	91.14%	6,789	5,893	100.00%	
January	92.47%	13,699	10,727	84.55%	
February	92.13%	11,985	10,827	96.97%	
March	93.45%	21,987	12,181	93.94%	
April	91.86%	20,739	8,338	98.77%	
May					
June					
July					
August					
September					
Average	91.86%	13,760.43	9,610.43	92.68%	
Target %	85.00%	9,500.00	10,200.00	90.00%	
% of Target	100%	100%	94.22%	100%	

Viewing of the Employer Training material is the only measure which is currently performing below its year-end target. However much of this can be attributed to the seasonal dips coinciding with holiday periods in the academic year. It is anticipated that this sub-target will be achieved by the end of the current contract year.

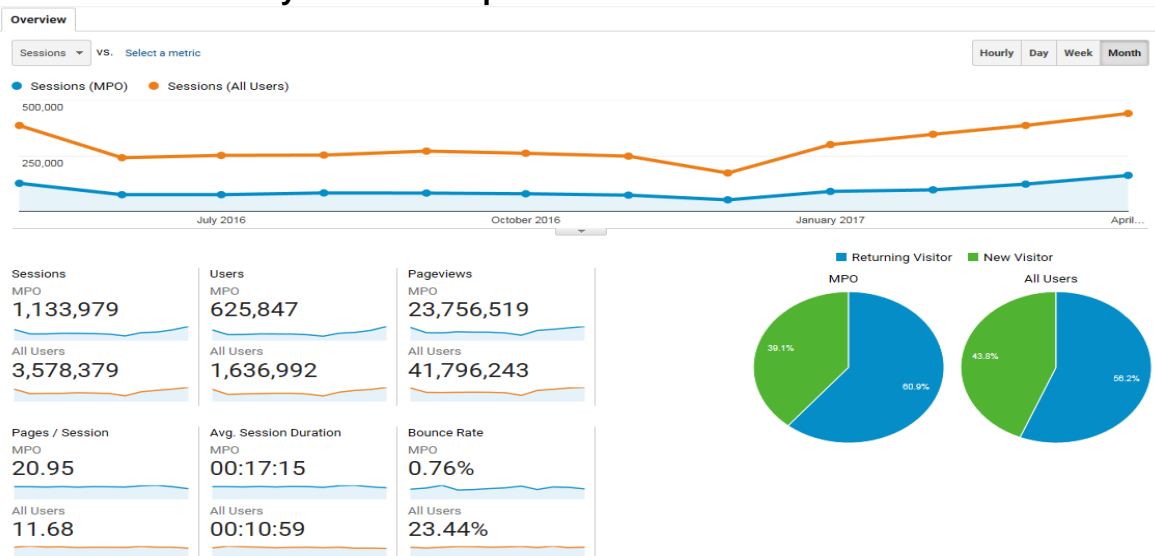
10. Monthly Data Collection (MDC) communications continue to be delivered in line with the established engagement plan for the exercise.
11. In March, TP began a three-month pilot with a cross section of employers, providing them with material to encourage them to more actively promote the benefits of the use of My Pension Online (MPO) with their staff. The employers had been identified as having staff with low levels of MPO take-up. The results of the trial will be available in June and will be shared with the group.
12. A revised approach to engaging with newly converted Academies and Free schools has been trialled during April, involving a ‘welcome’ call from TP to improve their experience and ensure that point of contact details are established quickly. The success of this and any lessons learned will be fed into the business as usual processes.
13. Regular stakeholder engagement meetings, which effectively provide support to TPARG as sub groups, have continued across the period and continue to be well received.

Website and social media/seminars



14. The refreshed website has been well received with positive feedback coming from members and stakeholders. This is also reflected in visitor numbers which are up by 41% and 16% in March and April respectively, when compared to the same months last year.

Web sessions 1st May 2016 – 30th April 2017



15. The scheme had 3,314 Twitter followers (311 additions in the reporting period) and 5,450 Facebook 'friends', which is an increase of 1,016 in the last 2 months.
16. The availability of learning material via YouTube is also proving successful with over 49k views published video clips in the period.
17. In period, 841 visits were made to the TPS Governance Pages on the TPS website.

Seminars/Webinars

18. Eight employer seminars (136 registrations) and 29 webinars (261 registrations), were successfully delivered in the period March and April. These predominantly focussed on MDC.

Forward look



- Continuing to work on the refinement of the website and review the Employer Portal and My Pension Online.
- Issuing of the next Member newsletter
- Issuing of the Payroll Provider Bulletin
- June 6 – TPAF event in York
- Continuation of the MDC engagement plan
- Working with NCTL, a review of NQT engagement to identify activity over the next 12 months
- Finalisation of the report reviewing mobile device app development feasibility

Acronyms used within this report:

ASR	Annual Service Return	NCTL	National College for Teaching and Leadership
GMP	Guaranteed Minimum Pension	NQT	Newly Qualified Teacher
HMRC	Her Majesty's Revenue and Customs	TPAF	Teachers Pensions Administration Forum
KPI	Key Performance Indicator(s)	TPARG	Teachers' Pensions Administration Review Group
MDC	Monthly Data Collection	TPS	Teachers' Pension Scheme
MPO	My Pension On-line		