

**Information to Members and Communications Sub-Committee  
23 March 2022 (by Teams teleconference)**

<b>Present:</b>		
Julie Huckstep	Member Representative – Chair	JH
Susan Anyan	Independent Pension Specialist	SA
Heather McKenzie	Member Representative	HM
John Pratten	Employer Representative	JP
Susan Fielden	Employer Representative	SF
Jo Cole	TP Engagement Manager (Employer)	JC
Jennie Connelly	TP Engagement Manager (Member)	JCon
Tony Watt	TP Engagement Manager	TW
Anna Alderson	DfE Senior Contract Manager and Programme Management Office	AA
Mark Dutson	DfE Contract Management Team	MD
Diana Wray	DfE TPSPB Secretariat (on behalf of Helen Cowen)	DW
Kathryn Symms	DfE Policy Team Leader Casework, Correspondence & TPSPB	KS
Kelly Elliott	DfE TPSPB Secretariat	KE
Lizzy Chard	DfE Policy Manager - observer	LC

	<b>Item</b>	<b>Action</b>
Agenda item 1	<p><b>Welcome and Apologies:</b></p> <ul style="list-style-type: none"> <li>JH welcomed those in attendance.</li> <li>The minutes from 15 December 2021 were ratified.</li> </ul>	
Agenda item 2	<p><b>Actions from the previous meeting:</b></p> <ul style="list-style-type: none"> <li><b>IM2/151221 – Institute of Customer Service (ICS) Survey Results - Action Plan</b></li> <li>JH invited JCon to talk through the action plan.</li> <li>JCon explained that Capita now have a standardised Reward and Recognition programme across the whole of their business. It was put into practice last year and they are hopeful for a positive influence on this year's internal ICS survey results.</li> <li>An outstanding action is to have a face-to-face internal focus group but this is deferred until after this year's results are known.</li> <li>Regardless, they do receive numerous amounts of feedback from both external and internal stakeholders about their customer service.</li> <li>SF asked how TP engaged with employers. JCon agreed to share TP's engagement plan.</li> </ul>	IM1/230322
Agenda Item 3	<p><b>Transitional Protection</b></p> <p>JC updated sub-committee members:</p> <ul style="list-style-type: none"> <li>Work has been focused on advising members about the changes being introduced from 1 April 2022, specifically tailoring messages dependent on whether a member's pension is or is not affected.</li> <li>Website content will be appropriately amended, and disclosure communications were issued in January 2022 to those members who will move from Final Salary (FS) to Career Average (CARE) on</li> </ul>	

	<p>1 April.</p> <ul style="list-style-type: none"> <li>• Channels used to disseminate the information were driven by members’ contact data: letter, email or MPO account.</li> <li>• A factsheet to explain the career average scheme is available to members. Employers have also received an email explaining what members have been told and what actions the employer may need to consider or take before and after 1 April.</li> <li>• Social media campaigns are happening in the run up to April, and reassurance campaigns are scheduled for the first week in April.</li> <li>• Case studies emphasise the different scenarios and statistics show these are well used. There is also a case study for members who are not affected by the changes.</li> <li>• JC apologised for a recent case study that contained an error. TP have enhanced the QA process to ensure that such an error cannot happen again.</li> <li>• Flexibilities online forms have been updated to allow final salary members to elect for faster accrual in March, and communications have been delivered to advise on this.</li> <li>• The monitoring of video usage has shown that the “Am I affected?” video (2.5 minutes long) has had 21,000 viewers, with those over 55 years old being the biggest audience. 88% viewed the whole video, 97% watched more than 30 seconds.</li> <li>• A second video “Why is the Scheme changing?” (4 minutes) has received 500 views on YouTube and is promoted on social media. The Facebook campaign has received over 8,000 through plays</li> <li>• A third video about the career average scheme is currently being recorded.</li> <li>• Social media has received no negative comments; and the contact centre received over 2,500 queries in February which is likely to be due to the communication effort.</li> <li>• Future messaging will focus on reassurance that their final salary benefits are safe and letting members know that they can apply for retirement in the normal way.</li> </ul> <ul style="list-style-type: none"> <li>• JP asked whether the volume of people that do not respond to communications was known. JC advised that as the audience was more mature or had an MPO account, they were more likely to respond and this was reflected in the open rates of emails.</li> <li>• JP asked if TP has approached employers for help in getting the messages out. JC confirmed employers have been made aware of what they should consider and the messages sent to members, as is the norm with all communications.</li> <li>• HM asked whether unions, as well as employers, could assist. JC confirmed union representatives were emailed alongside employer groups.</li> <li>• JH explained there had been a lot of Facebook chatter about faster accrual and that an engagement piece, giving some specific examples for members, in January 2023 would be helpful.</li> <li>• JC advised that there were some worked examples available for employers but agreed JH suggestion would be considered early next year.</li> </ul>	
<p>Agenda Item 4</p>	<p><b>Executive Review – Annual Review</b></p> <ul style="list-style-type: none"> <li>• JH reminded the sub-committee that the paper would be uploaded to</li> </ul>	

	<p>the Board’s webpage on TP’s website to demonstrate what the Board had been doing over the past year.</p> <ul style="list-style-type: none"> <li>• KS advised that this report was produced at the end of each financial year (31 March) and was a summary for the minister to show what the Board had been involved with, but was also a useful document to share with employers and Unions.</li> <li>• The sub-committee agreed that the report was an accurate reflection of their activities over the past 12 months and will recommend that the Board accepts this report at the next meeting in April.</li> </ul>	
Agenda Item 5	<p><b>Deferred Member Communications/website</b></p> <p>JCon presented slides to give an overview of the workplan that was being followed to better engage with deferred members. JCon highlighted the following key points:</p> <ul style="list-style-type: none"> <li>• Deferred members are grouped into two categories – those that have left teaching, and those that remain in teaching but opted out of the pension scheme. Communications will be tailored for each category because each group has different needs.</li> <li>• The primary feedback from the last focus group, was that information was hard to find on the website, and some content needed updating.</li> <li>• Recent changes included improved website content and layout, and a better site search function. Another focus group will be held to see if the changes have improved member satisfaction.</li> <li>• It is difficult to communicate with deferred members, particularly those who are no longer employed in the teaching profession, or those who have small pension pots. JCon noted that the introduction of the Pension Dashboard should help in encouraging engagement.</li> <li>• The new challenge is communicating with those former members whose independent school chose to withdraw from the scheme. Whilst the messages are the same, some of the language is changed slightly because these deferred members have not necessarily left the scheme by choice.</li> <li>• Last summer, the myth buster campaign and video were successful – with 86% of viewers watching the whole of the three-minute video (which is considered long). This campaign led to an increase in subscribers to the YouTube channel.</li> <li>• Although low numbers of deferred members used the website search engine, 49% of those that did were directed to “Working Life – Deferring your Pension”, so this is where all signposting will be anchored.</li> <li>• Next steps include specific focus groups to better understand opt out reasons, bespoke communications and video/presentations, and exploring how to further segment deferred members - for example, those with a smaller pension pot.</li> <li>• HM was concerned that former members from the independent sector were not receiving information about the TPS. JCon assured that these members still got all the necessary information, but it was more carefully worded to suit their deferred status.</li> <li>• JP suggested that Independent Schools Bursars Association (ISBA) could be a useful resource for reaching deferred members whose employers had left the TPS.</li> <li>• SF noted that the employer section of the website does not hold</li> </ul>	

	<p>information on deferred members and thought it could be considered. SF also requested information on the best practice numbers for open/click through rates for comparison against TP percentage rates.</p> <ul style="list-style-type: none"> <li>• JCon confirmed number rates showed deferred members were least engaged but was unsure of bench marking information. JCon agreed to investigate this and share any information available.</li> <li>• SA observed that the Pension Dashboard should encourage more engagement from deferred members as they sought former pensions. JCon assured the sub-committee that she was joined up with Pension Dashboard project and attended relevant meetings.</li> <li>• JH thanked JCon for her presentation and was pleased to note progress in engaging more effectively with the deferred member population.</li> </ul>	<p>IM2/230322</p>
<p>Agenda Item 6</p>	<p><b>Accessibility and Brand</b></p> <p>TW presented slides that gave an overview accessibility and branding which must comply with legal requirements, specifically the Equality Act (2010) and the Disability Discrimination Act (1995) and more recently the Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018. TW highlight the following key points:</p> <ul style="list-style-type: none"> <li>• Disabilities that must be considered include visual, physical, cognitive, literacy and hearing disabilities. TP must then consider the various devices that might be used to access information.</li> <li>• TP use Web Content Accessibility Guidelines (WCAG) 2.1 as their basis for shaping how they utilise desktops, mobile applications and other similar technology and devices, but caveated that the guidelines are subject to continuous change so it is a moveable feast to secure 100% compliance, but that is their aspiration.</li> <li>• Work started in 2018 and has been progressing with TP’s branding incorporating accessibility requirements across its website content and assets.</li> <li>• Content has been updated so that PDF forms are built in a more compliant way, videos have audio-descriptive options and links are easier to navigate through “skip to user” links.</li> <li>• Email communications are constructed, mindful of accessibility in respect of text, columns and layout, to ensure accessibility tools can be used easily. For example, any images have text outside the image so that it can be read by the screen-reader tool.</li> <li>• There will be annual accessibility audits and statements, but TP is always updating materials to ensure they keep up with requirements.</li> <li>• JP mentioned members who may be suffering from ailments such as dementia, and questioned the route they could take for getting family members to engage on their behalf.</li> <li>• JH referenced data protection concerns and the limits on information other family members could be told without consent.</li> <li>• KS agreed there is difficulty because of GDPR limitations, and TP already correspond with family members where the members have given written authority for TP to do so. KS also advised that there was a lot of information on the TP website about the scheme that family members could access without consent as it was in the public domain.</li> <li>• HM agreed on the GDPR point and that the member consent letters</li> </ul>	

	<p>worked well. HM made the point of the fine balance of letting family members understand the route open to them to get information and minimising the risk of scamming. HM questioned how useful a website might be for those with certain mental health issues and other accessibility issues, and sought assurance that the option to talk with someone is still available.</p> <ul style="list-style-type: none"> <li>• TW provided this assurance, citing webchat and the contact centre as alternate contact options.</li> <li>• JH thanked TW for the interesting and reassuring presentation.</li> </ul>	
Agenda Item 7	<p><b>Review of Papers</b></p> <ul style="list-style-type: none"> <li>• JH noted that OM2 was a good result, and queried why OM3 result for December was lower than the previous 12 months.</li> <li>• AA confirmed that OM3 was affected by seasonality ie the number of retirements, so it was expected that this measure would recover quickly.</li> <li>• SF noted that for OM9 and OM10 employer satisfaction was below target.</li> <li>• AA advised that employers were sent a survey at each touch point to encourage feedback, but the dip in performance was due to TP struggling to get employers to provide feedback. There are plans in place to address low feedback volumes.</li> <li>• SF asked for the percentage of non-return rate.</li> <li>• AA advised that these figures were unavailable.</li> </ul>	
Agenda Item 8	<p><b>Agree top 3 issues from the meeting/report to highlight to the next TPSPB</b></p> <ul style="list-style-type: none"> <li>• Executive Review</li> <li>• Transitional Protection - Engagement Plan</li> <li>• Deferred Members</li> </ul>	
Agenda Item 9	<p><b>Agree whether any papers or presentations should be shared with the rest of the Board for information</b></p> <ul style="list-style-type: none"> <li>• Executive Review</li> <li>• Deferred Members - presentation</li> <li>• Accessibility and Branding - presentation</li> </ul>	IM3/230322
Agenda item 10	<p><b>AOB:</b></p> <ul style="list-style-type: none"> <li>• It was agreed that the June and September 2022 meetings would be held face to face in Darlington, and December 2022 meeting would be by Teams. For 2023, it was agreed that alternate meetings would be face-to-face starting in March 2023.</li> </ul>	
Next meeting	22 June 2022 (Darlington)	

Minutes agreed by Chair: *Julie Huckstep* Date: 25 March 2022

Circulated to sub-committee members on 30 March 2022

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