**Information to Members and Communications Sub-Committee**

**21 September 2022 (face to face)**

|  |  |  |
| --- | --- | --- |
| **Present:** |  |  |
| Julie Huckstep  | Member Representative – Chair | JH |
| Susan Anyan | Independent Pension Specialist | SA |
| Heather McKenzie | Member Representative | HM |
| Susan Fielden | Employer Representative | SF |
| John Pratten | Employer Representative | JP |
| Kerry Tate | TP Head of Marketing and Engagement | KT |
| Amy Gibbs | TP Head of Governance and Risk | AG |
| Jo Cole | TP Engagement Manager (Employer) | JC |
| Jennie Connelly | TP Engagement Manager (Member) | JCon |
| Anna-Marie Alderson | DfE Senior Contract Manager  | AA |
| Melanie Phillip | DfE Policy Team Leader Casework, Correspondence & TPSPB  | MP |
| Mark Dutson | DfE Contract Management Team | MD |
| Helen Cowan | DfE TPSPB Secretariat Manager | HC |
|  |  |  |
| **Observers:-** |  |  |
| Lisa Sproats | Employer Representative | LS |
| Maria Chondrogianni | Member Representative | MC |
| Anna Leonard | DfE Head of Supplier Management | AL |

|  |  |  |
| --- | --- | --- |
|  | **Item** | **Action** |
| Agenda item 1 | **Welcome and Apologies:*** JH welcomed those in attendance particularly new Board members

 Lisa Sproats and Maria Chondrogianni as observers.* The minutes from 22 June 2022 were ratified.
 |  |
| Agenda item 2 | **Actions from the previous meeting:*** **SD220622** - **Money and Pension Service (referred from SD&MoD) – TP to consider what website guidance is available regarding trending queries** – JCon informed Board members that the report had recurring trends including tax, bereavements, transfers, pension on divorce and ill health. TP intend to do promotions on social media and future campaigns to raise awareness of the issues. They will also update the glossary on the website. These topics will also be included in future campaigns.
* **IM2/220622 – MCR – Update on the escalation procedure for those employers who had not onboarded or receptive** – AA reported there is a replan of the MCR project and associated activity, one activity being the escalation process. Communications and employer engagement will support MCR. Where employers are not engaging, the escalation process will include letters to the headteacher/head of MAT, head of governors, members and escalation to DfE if necessary. Once the Department have the detail around the escalation process agreed, it will be shared with this sub-committee.
* SF queried whether the escalation process would be engaged if it was the employer that was reluctant rather than the payroll provider. AA confirmed it could be triggered by either, as it was whoever submits the MCR file. JC explained that an employer may be reluctant because they don’t have the software to deliver for example, therefore it was important to work with all parties to ensure the right solution was delivered.
* HM enquired where there was a lack of engagement by the employer, could members be at risk i.e. conflict of interest? AA verified that an escalation point of MCR could include a letter to the member, but that this would only be used as a last resort.
* JP questioned how the independent sector was dealing with the change. AA said 10% of the employer base are live on MCR and submitting data and that they include a mixture of schools and establishment types. However, when they do start onboarding the wider network, they may utilise independent school contacts. JC advised the stakeholder team has very good relationships with the different employer groups.
* **IM4/220622 – Review of Papers – the reasons why schools had left the scheme would subsequently apply to re-join** – AA mentioned that the level of information available to schools to re-join the scheme is clearly set out on the website and what they need to do to successfully re-join the scheme. More information will be available when the Department have the scheme valuation results in Autumn and they are expecting that some independent schools may leave the scheme. However, communications are set up if independent schools want to re-join the scheme also.
 |  |
| Agenda Item 3 | **Transitional Protection**JC updated sub-committee members on the work delivered since the last meeting. * She reported that, based on the replanning exercise, the proposed date to start communications is October 2023. Transitional Protection has been split into two elements. Stage 1 focussed on the closure of the final salary scheme and moving all members into the career average scheme from 1 April 2022.
* TP are now creating a communications strategy which focusses on Stage 2. Stage 2 addresses the different treatment of members in the remedy period (1 April 2015-31 March 2022) and will be implemented when the necessary legislation is in place. This will return members’ service to the final salary legacy scheme for the remedy period and allow members to make a choice between final salary and career average for that service.
* TP have reviewed the original communications strategy, identified new elements which needed to be included, removed suggested communications which were no longer required and identified activities which would need to be repeated e.g. a complete review of the website.
* The communications strategy has gone to the Transitional Protection Project Board and next steps will be to deliver the plan.
* Communications to members have mainly focused on delivering the benefit statement campaign but have sought to tie in messages around Transitional Protection and publicising the October 2023 date.
* Contact to TP around the October 2023 date has been minimal. In preparation for October 2023, all web-based communications, social media, employer communications and internal communications have been updated.
* There have been bespoke communications in relation to ill-health and medical reassessments which need to be reconsidered for members who have been refused under the rules of the legacy scheme or were originally awarded a Tier 1 award but may now be reconsidered as Tier 2. TP have reassured affected members that plans will be reassessed, and members only needed to contact TP if they didn’t need to be reassessed. TP are now in the process of contacting those who do not need medical reassessments as they already have sufficient information but will need to be looked at in terms of choices.
* TP have also provided specific content on CETV (Cash Equivalent Transfer Value) to members regarding entitlement to potential different pension benefits e.g. pensions on divorce and look at some past cases since 10 March. TP are seeing over 187,420 views on member news and 14,688 views on employer news. On YouTube they have seen 24k views on the ‘Am I affected’ video.
* JH enquired if the page views were viewed by the same person three times would that count as one view. JC confirmed she had given the general views but that they could report on the unique views as well if useful.
 |  |
| Agenda Item 4 | **Social Media**JCon shared slides on social media strategy 2022 and onwards with Board members – TP’s main goals are:- * To use social media to help stakeholders engage with the scheme, support them throughout each stage of their journey, promote changes and improve relationships with new and existing stakeholders. As well as offer users an additional method of reliable communication and to build trust with new and existing stakeholders.
* To measure and improve their engagement rate (slide 2). JCon explained the slide showed their target engagement rate.  Currently they are 4% for Facebook, 4% for Twitter, 2% for Instagram and for Linkedin currently 7%.  She explained that industry standards are around 1%.
* To grow online presence, continue to engage with the audience using targeted adverts as well as promotion across web and email campaigns. The benefit of this being able to communicate important pension-based messaging using multiple methods while also keeping an open channel for members to engage directly with.
* To increase brand awareness of Teachers’ Pensions and improve their reputation with stakeholders and enhance their knowledge.
* To increase traffic to the website allowing people to get more rich information and content and signpost to more complex information, which is also best practice on social media.
* To expand reach with a wider audience and other stakeholders.  There are good links with unions.
* JCon shared information detailing the target audiences on each of the social media sites and how they are used to highlight scheme benefits, educate to encourage self-service and use of MPO and share news and updates etc. She discussed how there are communities on the sites that discuss and share experiences of being a member of the scheme, such as retired members talking to newly qualified teachers. Assurance was given here that the accuracy and suitability of member generated comments was closely monitored. For Instagram, TP are currently looking at using Tik Tok, which has a large community of teachers who are sharing hits and tips, sharing lesson plans etc.  YouTube works well for videos and gives members good information throughout their journey in bitesize content.
* Metrics – this year the primary focus is on increasing followers and the engagement rate. TP want to see improvements and build a community feel, particularly on Facebook where members can get good quality information and resources.  To complement the metrics, TP also analyse likes, shares, comments daily in order to understand their audience and to build community and trust to ensure good quality engagement.
* TP are looking at what their competitors are doing in the public sector pension world and use social media listening sites looking for improvements they can make, i.e. benchmarking and best practices.
* TP continue to do monthly reporting on their ongoing performance, including return on investment from the targeted campaigns and keeping abreast of the latest information.
* Email and web campaigns are also utilised. There is an annual budget for targeted ads. The campaign on Pension Awareness 2022 will run in October/November.  TP shared examples of comms being used for NQTs utilising retired members to share information on benefits etc. which is then used across social media.
* Next steps are to continue to develop communication methods, scheme knowledge using bite sized videos etc., and social trends. Considering working with well-known teachers (influencers), look at how they can promote the retirement journey.

 * SF mentioned that she was representing the Confederation of School Trusts which had nearly 1,000 MATs and stand-alone trusts. She queried if there was anything they could do as an organisation to help i.e. share, retweet etc. JCon agreed they could work together to share information.

 * JH referred to a discrepancy in the papers regarding the engagement rate and queried the reason for this. JCon explained that Facebook had changed the way they presented the engagement rate mid-year which had skewed the results.  The 8% figure was therefore the correct one accounting for this. TP had contacted Facebook to better understand the change but had received no response. This has been raised with DfE and they continue to monitor.

 * SA asked if TP had thought about observing PensionBee as they tap into the younger market place.  JCon confirmed that they had been looking at their content and that they are ensuring they’re targeting the correct audience on the correct platform.
* JH thanked JCon for a very useful presentation.

  |  |
| Agenda Item 5 | **Institute of Customer Service – Results**Jcon discussed that TP use ICS and CEM as they are good sources of benchmarking to measure within their sector and wider industries.  The feedback received was two-fold – internal was in Feb/Mar and external was in Feb/Mar/Apr.  Key highlights are:-* **Internal highlights** - TP staff were asked 90 statements about their attitudes and behaviours of Teachers’ Pensions.  In comparison to March 2021, they have seen increases in all three areas and most in ‘people’ which are specifically questions about how valued staff feel at TP.  They scored lowest in creativity and highest in credibility.  They scored 71.71, which was four points above the average for Government Department and Agencies sector and 6 points below the average of all sectors.  The highest scoring question is that SMT believe great customer service is important to performance. Lowest scores were around rewarding staff.
* **Highest and lowest scoring questions** are consistent with last year.  Last year, they scored two higher than the UK average, this time they didn’t have any higher. However, most areas have improved by 5 points. On a positive note, the lowest scores have all increased by 10 points compared to 2021.
* **Customer Satisfaction (internal**) – staff were asked ‘what’s the one thing they could do to improve customers satisfaction of our users’?  Most are consistent with 2021 and 2019 which demonstrates communicating the work undertaken to improve customer satisfaction since then may not be filtering down to everyone.  Training was mentioned the most frequently this time along with the number of staff leaving the business. Staff feel that the website is still jargon heavy.  On flexibility, staff felt that the organisation had done a lot to help staff with their personal circumstances but that opening hours could be looked at to help the call volumes and wait times of teachers trying to get in touch up until 8 pm.  Some staff said they were not aware of the outcomes but the engagement team have done a great deal of work internally to cascade messages in the business.
* JP expressed concern regarding communication being part of the improvement suggestions. JCon clarified that staff felt that some information that had been launched had not been communicated to users, although it had been (so TP will look at why staff perceive this) but, in the main, people were happy with communications. AG also commented that communication was also one of the highest scoring areas which suggests some areas of the business are doing it well, but others could do better.
* **Customer Satisfaction (External)** – TP surveyed 109 employers and 100 members against 26 metrics.  They then benchmarked results against Public Services and the UK overall.  TP’s score is 64.1 which is one point down from last year and unfortunately is the lowest in the sector.  TP struggled to gain feedback; it took three months to get the required 100 and 109 members and employers to complete the surveys.  JCon believes there is a lot of fatigue around surveys in general and they will consider new ways of getting feedback.
* SA asked how TP asked for feedback – JCon said it has to be done via email with a list of questions set by ICS.
* MC asked if there were alternative methods to email to seek feedback.  JCon agreed and said they need to look at alternative ways for feedback although ICS has strict parameters. AG mentioned there was a session on 22 September 2022 to look at outcome measures and different ways of getting feedback.
* **How did we do?** – Employers were most satisfied with the helpfulness of staff, competence of staff and billing/invoicing.  Users were less satisfied with the speed of resolving complaints, handling of the complaint and designing the experience around the customer.  This feedback was consistent with previous years.  Members were most satisfied with reputation, products/service reliability and competence of staff, and least satisfied with the outcome of the complaint, handling of the complaint and making it easy to contact the right person.
* **Describe the service in three words using word cloud** i.e. the bigger the word the more times it was said.  For employer - The heat map showed lots of highs (greens 9/10) and lows (reds 1/2) with minimal in the middle.  There were a significant number of very positive words and very negative words which shows how polarised opinions are of both members and employers which shows that TP is offering exceptional service as well as service that needs to see improvements.  For member - The member heatmap does indicate more satisfaction with TPs service as indicated by less ‘red’ and more ‘green’.  Although there remains a pattern which shows highs and lows with not a lot in the middle and significant numbers of very positive words and very negative words.
* **What’s the one thing we could do to improve customer satisfaction?** – JCon reported that feedback was consistent amongst members and employers and consistent with previous years.
* **What’s next?** – JCon confirmed next steps were to review the 2021 action plan, to create a new action plan from this data, conduct a deep dive of data and to share the results with staff and key stakeholders.  The next ICS survey will be done in March 2023.
* JH asked if it was possible to tell what segment of people were confused, frustrated etc.?  JCon agreed it would be helpful to understand this but the responses are anonymous. Also, as the sample size was so small, the results may not be as positive and other organisations may have received more responses.
 |  |
| Agenda Item 6 | **Review of Papers****Quarterly Report*** JH noted on Page 2 the Summer Retirement Exercise (SRE) had been successfully completed.
* Page 3, Paragraph 11 there was an issue with the change of the ill health supplier which has caused some delays, resulting in backlog cases. AA confirmed that during the implementation process there had been problems with IT access resulting in 160 backlog of cases up to and including 31 July. A deadline has been set for middle of September for completion of the cases because from 1st October, work begins on the Transitional Protection cases. Apart from a handful of cases the backlog has now been completed. A lesson learned regarding communications was that the members were not appropriately informed regarding the delay. Therefore, a communication plan will be built in for any subsequent delays.
* JH noted Page 7 outcome measures for members understand the value of their Teachers’ Pension engagement and members are actively planning for their retirement were within target and very positive.
* JH referred to page 7, paragraph 38 which stated that TP consistently achieved the target and it continues to perform well. TP circulated the Benefit Statement campaign and conducted social media messaging on the topic of understanding their Benefit Statement.
* Reference was made to page 9, paragraph 45, OM11b – which related to employers engaging with the scheme. JH noted that there has been significant improvement since more people are engaging.
* Page 12, paragraph 53 indicated there had been a significant number of visits linked to the benefit statement campaign and the most watched video on YouTube was the updated benefit statement video.
* JH reported that there was no active issues. However, the ill health delays will become an issue and be reported in the next Quarterly Report.
 |  |
| Agenda Item 8 | **Agree top 3 issues from the meeting/report to highlight to the next TPSPB*** Ill health delays
* Social media
* ICS results
 |  |
| Agenda Item 9 | **Agree whether any papers or presentations should be shared with the rest of the Board for information*** Board members agreed that all presentations would be shared with the rest of the Board.
 | IM1/210922 |
| Agenda item 10 | **AOB:*** No other business was reported.
 |  |
| Next meeting | 14 December 2022 via Teams |   |

Minutes agreed by Chair: Julie Huckstep Date: 3 October 2022

Circulated to sub-committee members on 3 October 2022

To be ratified at the 14 December 2022 sub-committee meeting.