

## **Engagement August 2016 – September 2016**

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 impacts on 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;
- Enable 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 – the on-lining 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 – to 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.

**Member engagement and campaigns**



1. The number of members holding an MPO account continues to increase with around 10k members signing up each month. Numbers are anticipated to reach a landmark 500k in November. This will be celebrated and become the focus of the engagement communications in the short term to encourage other members to sign up e.g. ‘half a million members can’t be wrong, so why not set up your own account to find out what you’re missing out on’.
2. Engagement Outcomes for Contract Year 5 have been subject to significant review in the last 12 months. As discussed at the September Board meeting, whereas previously these Outcome measures have been dependent on the results of an annual external survey asking members to reflect on their experiences over the previous 12 months, TP has moved to a process of gaining live feedback at the point of contact with the member or employer.
3. While the new Outcome targets have been mostly met (only those relating to “members actively planning for their retirement” and two sub-elements of the employer engagement target being missed), the results do reflect a much more accurate picture of levels of engagement across the business. Access to this ‘live’ feedback has helped TP’s to more effectively identify and improve less effective communication links and this in turn is driving service improvements.

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4. The scheme continues to benefit from the ‘real time’ feedback, including verbatim commentary from employers and members, in securing much of this data, which continues to drive further service improvements.
5. Automated communications in general continue to achieve their targets and the activity will be subject to review as the engagement plan for 2017 is developed. The draft 2017 plan will be circulated to the sub-committee for comment in early December. As part of the review we are also looking the current targets for “open” and “click through” rates to determine whether these remain appropriate as communication routes develop further, with the greater emphasis on Social Media, and an increasing

number of members engaging through their MPO account.

6. Website usage in September saw an increase in the number of members accessing re-employment certificates and opt out forms when compared to August – however this is expected at the start of a new academic year.

### Employer engagement and campaigns



7. Evidence of employer engagement with the scheme remains strong and, while it fell below the outcome target for the current contract year, usage of the employer portal remains consistent at 90%. Although we gain assurance through other means (e.g. the receipt of pension contributions) of employer engagement with the scheme, work is underway to identify the residual 10% of employers to understand whether this is a group who consistently fail to use the portal, and what approach can be taken to encourage them to do so.
8. Monthly e-bulletins have been subject to a re-vamp and continue to be well received, consistently hitting their targets for employer engagement.
9. MDC remains a key challenge and focus for employer communications, with an increased intensity in engaging employers who have yet to acknowledge the move to MDC. TP are targeting employers through a series of engagement activities to ensure awareness of Monthly Data Collection, including:
  - General awareness campaigns to those employers who have yet to sign up to the on-boarding process. Two campaigns have been delivered to date and a third is scheduled in November. “Open” rates are being monitored. Where emails are not opened, and the employer has not signed up, they will be contacted by the MDC team.
  - An email campaign, and follow up communications, to Heads of Finance and Headteachers.
  - Those participants in webinars, provided for employers to gain an oversight of the scheme, who have registered for but not on-boarded will be contacted by the MDC team.
  - The MDC team are contacting employers to gain intelligence on where they are in the on-boarding process, and whether they are using a payroll provider (to determine if they are reliant on the provider delivering a solution).
  - TP are looking at the MDC journey for all employers to ensure they are able to meet their on-boarding date and avoid slippage. TP are reviewing both email engagement (such as contacting employers 6 weeks prior to their scheduled on-boarding date) and making direct telephone contact where TP have received no confirmation that employers are still on target to meet their on-boarding date.

- Communication with School Governors to ensure that they understand the requirements of MDC and to encourage sign up of outstanding establishments.
  - Direct communication with payroll providers to determine their timescales for providing solutions for employers. Working with payroll providers on developing their solutions.
  - Although there is no immediate plan to engage directly with employees at establishments who have not yet engaged in the process, this remains an option as MDC will provide benefits to members as TP will hold more current member contact details (email addresses).
10. Work continues through a new working group to develop links with the Department's academies team and the Education Funding Agency to improve engagement with new employers, specifically academies. This addresses a risk noted the Department's Audit and Risk Committee. The TPS Policy team has received agreement that amendments to the main academies conversion documents, including guidance and the checklist, can be made to introduce teachers' pensions at an earlier stage. The Department and TP have agreed the wording of those amendments with academies colleagues. The new academies guidance and check list is being provided to all conversion project leads and will be in use by the end of October. TP will continue to monitor engagement with converting schools and provide an update early in 2017.
11. This work will ensure that key messages about employers' responsibilities to the scheme and its members are being relayed and clearly understood by academies prior to their conversion.

#### Stakeholder engagement

12. The latest Teachers' Pensions Administration Review Group (TPARG) meeting was held on 3 October. Key points discussed by employer and employee representatives included:
- TP's performance against the telephony SLA.
  - The presentation to the group of employer performance data. Concerns were raised that there was no supporting narrative setting out mitigating circumstances, which could lead to misrepresentation of the employers' actual performance.
  - The much improved position regarding ASR returns in the current year was recognised by the group.
  - Employer representatives identified the increase in debt arising from the recent 'remarriage' exercise delivered by TP and asked for sensitivity when dealing with these cases.
  - There was discussion around the profile of those accessing their Benefit Statements online and the shared interest in engaging younger employees.

13. Regular stakeholder engagement meetings, which effectively provide support to TPARG as sub groups, have continued across the period.

**Website and social media/seminars**



14. Following a slight decline in website visitors during August, numbers have bounced back to 273k visitors in September. This represents a 23% increase when compared to September 2015.

**Sessions on the web since October 2015**



**Sessions with MPO registration**



15. The scheme now has over 2,421 Twitter followers (372 additions in the reporting period) and 3,254 Facebook ‘friends’, which is an increase of 728 during the same period.

**Marketing Exemption**

16. The scheme has previously required annual approval from the Department for ‘marketing exemption’. This is to meet the requirements of cross-

government controls on expenditure which could be perceived as advertising or marketing and has previously constituted the use of 'promoted posts' through social media channels. However, it has been agreed that, as the costs of scheme administration are no longer met by the Department, there is no requirement to secure exemption. TP will however retain a close working relationship with the Department's engagement team to ensure they continue to meet Government communication standards, and further develop the scheme's profile in Departmental communications.

17. The 'promoted post' campaigns delivered in August and September were aimed at signposting the recently launched NQT hub on the TP website. These have paid real dividends in sparking interest among NQTs, with Facebook and Twitter achieving 52,175 and 142,627 impressions respectively. It has also led to an additional 513 NQT members setting up MPO accounts.

### **Seminars/Webinars**

18. Four employer seminars (72 registrations) and 34 webinars (435 registrations), focussing on MDC, were successfully delivered in the last quarter. There have been a number of 'no shows' at some of the webinar events - the MDC team is taking follow-up action to contact those employers failing to attend to ensure they are fully engaged in the MDC process.

### **Forward look**



- Four seminars will be held in October.
- There will be an increase in the intensity of communication with employers who have not yet fully engaged with TP in the MDC process.
- The next TPARG meeting will take place in London on 17 January.
- Continuation of website development work to support a roll out from January 2017.
- Work on the Engagement Plan for 2017 will continue with the draft plan being circulated to the sub-committee for comment in early December.