

Information to Members and Communications Sub-Committee
16 June 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	JC
Tony Watt	TP Digital Engagement Manager	TW
Peter Springhall	DfE Head of TPS Supplier Management	PSp
Helen Cowan	DfE TPSPB Secretariat	HC
Ann Ratcliffe	DfE TPSPB Secretariat	AR
Kathryn Symms	DfE Policy Team Leader Casework, Correspondence & TPSPB	KS
Mark Dutson	DfE Contract Management Team	MD
Alan Hunt	DfE Contract Manager (observer)	AH
Mathew Vaughan	DfE Valuation Manager (observer)	MV
Apologies:		
Sue Crane	DfE Senior Contract Manager	SC
Ian Payne	Employer Representative	IP

	Item	Action
Agenda item 1	<p>Welcome and Apologies:</p> <ul style="list-style-type: none"> JH welcomed those in attendance, and accepted apologies from Ian Payne and Sue Crane. The minutes from 24 March 2021 were ratified. 	
Agenda item 2	<p>Review of Actions arising from 24 March 2021 meeting:</p> <ul style="list-style-type: none"> IM1/240321 – Quarterly Report – Unique page views have gone down – MD directed Board members to paragraph 27. He highlighted that dips are traditionally experienced in December, March and August (Christmas, Easter and peak of summer holidays) because employers are not in the office as much. The figures are now back on track and exceeding the target. IM3/240321 – Forward work plan topic – Independent Schools – JC advised that a communication plan for phased withdrawal has been developed in line with feedback from the previous meeting and discussions with ISBA. Feedback from ISBA was that members are not necessarily close enough to their pensions to understand the implications of the schools opting out; and some employers were not aware of TP's communications about the process to withdraw from the TPS. TP is therefore planning reinforced messaging to employers about their obligations, and advising members what information is available to them. There will be further information on the website by 19 June about the benefits of the Scheme. There will be a bespoke campaign in September about phased withdrawal. TP will also be involved in delivering webinars with ISBA at that time. HM mentioned there was concern in some schools about some articles that appeared to be scaremongering, and whether there 	

	<p>was anything the Board could do to help ensure clear and accurate information was shared with the members.</p> <ul style="list-style-type: none"> • JC explained that TP recognise the challenges and will continue to get those important messages out to both members and employers. She appreciated the support from unions. • JP also referred to third party influences with a commercial interest, but acknowledged that there was little ISBA and others can do about the articles. He reassured that the ISBA is working closely with TP to make sure the information is available. • PSp added that it is important that these articles are drawn to the attention of TP to enable them to adapt messaging. • HM mentioned that ‘fire’ and ‘re-hire’ was being used to push members into joining other schemes. It was agreed that this was a wider employment matter. <ul style="list-style-type: none"> • IM4/240321 – Forward Workplan topic – MPO take up at Independent Schools – MD referred Board members to paragraph 97 of the quarterly report and advised that uptake for the independent sector is higher than most sectors, and on par with academy trusts. The latest figure for May is that 82% of members at independent schools have an MPO account. • IM5/240321 – Engagement with University Sector – JC explained UCEA works closely with TP, and is happy to set up Q&A sessions with HEIs. There are regular engagement and stakeholder meetings which involve TP. TP had contacted Universities UK (UUK), but UUK tend to focus on the USS. • IM6/240321 – Quarterly Report re comms on Goodwin – MD confirmed that Goodwin communications has been added as a standing agenda (Item 5). 	
Agenda Item 3	<p>PASA Cybercrime Guidance – suggestion that Trade Unions and Employers can raise awareness of cyber-security (referred from MR&IC sub-committee (MR3/240321))</p> <ul style="list-style-type: none"> • SA explained that cybercrime was discussed in the March MR&IC meeting, where it was agreed that the security risks should be highlighted to members. • JC confirmed that TP’s engagement team has this in hand. News stories have been delivered on both the employer and member websites and in a recent employer bulletin. It will be included in a members’ (active and deferred) newsletter in July, and a pensioner newsletter later this year. • TP has had 276 page views on the member site and 19 on the employer site, but this will increase once the newsletter is released. • TP also delivered social media posts on Facebook, Twitter and LinkedIn with a message about keeping safe online and what to do if you think you are victim of fraud. This information has been shared with Unions. 	

<p>Agenda Item 4</p>	<p>Transitional Protection (comms strategy)</p> <p>JC discussed key updates:</p> <ul style="list-style-type: none"> • The Communications Strategy has been developed with the Department and was approved at the Transitional Protection Programme Board on 11 June. The plan brings together a programme of communications delivery and engagement around the changes to the scheme from 1st April 2022. • Following stakeholder engagement, two myth busting factsheets have been created (one member and one employer). They have been published on the website and in the member and employer bulletins, and promoted through social media. It was the most successful twitter post in May. To date there have been 735 views of the member factsheet and 53 of employer factsheet. This is likely to increase once promoted in the member bulletin. • TP is working on improving the presentation and content of the FAQs. There are around 40 FAQs on the member and employer website that will put into sub-sections based on the topic, so answers will be easier to find. • TP is tying this in with the BAU “Retirement Ready” campaign. This is an annual campaign to those who are eligible for retirement, and TP messaging clearly advises members that they can retire as normal. There was an increase in Transitional Protection website visits due to this campaign. • Stakeholder events about Transitional Protection are being held, for example, the TPAF virtual event was held recently where 350 employers registered for the event. The LGA Conference and Communications Strategy meeting with unions and employers are due this month. • Staff training across TP will also be taking place – a presentation has been developed, with policy colleagues providing input and explaining terminology clearly. • Transitional Protection continues to prompt interaction between members on social media. It is consistently the most popular post with good engagement, and members help one another by signposting to website information. • Contact centre enquiries remain manageable with 231 calls in this period. 40% asked if it would affect them. The website has had 16,796 page views (member) and 597 page views (employer). • Next steps include the completion of the Glossary of Key Terms which will be consulted on – for example, through a member forum – before it is published. TP will also be using a Treasury fact sheet which helpfully has a simple table detailing who is and who is not affected. • JH asked if there was a specific timeline for future engagement that could be shared with Board members. JC confirmed there is a timeline up to April 2023 that aligns engagement with key government dates, such as consultations and laying regulations. The timeline will be amended in line with any changes made by government. • HM queried the timing of issuing the myth busting fact sheet because she felt that teachers appreciate generic information, such 	<p>IM1/160621</p>
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	<p>as this fact sheet, being shared with employers and members at the same time. JC confirmed that when stories go on the website and social media, they go both on the same time. However, employer bulletins and member engagement might be at slightly different times because TP prefer to use BAU communications as far as possible.</p>	
Agenda Item 5	<p>Goodwin</p> <ul style="list-style-type: none"> JC explained that the Goodwin communication plan is with the Department for sign-off. TP colleagues are currently working on amendments to the website, FAQs, family benefits letters and benefit statements. TW advised that this is in readiness for a communications piece in September. TW shared a draft version of an online Goodwin “decision tree” which will be shared with the Department once user-testing has been completed. The “decision tree” is an online tool that asks a series of questions which will enable members to self-serve to determine how Goodwin affects them. TP has tested the tool with members and refined the process with support from policy colleagues. TP has developed different personas for people who are currently receiving benefits and those enquiring about future benefits. TW then shared a flow chart/tree with all of the scenarios and questions that have been mapped. TW advised that there was still further work and development needed. JH thanked TW recognising that the tool will help prevent calls to the contact centre. TW added that there is an enhanced live webchat being developed through the continuous improvement programme. He has been working closely with that team to integrate the “decision tree” into that chat. 	
Agenda Item 6	<p>Monitor service history/missing service and review future campaigns.</p> <ul style="list-style-type: none"> JH indicated that this has been a standing item for some time and work had been done to try to address various aspects of it. JC agreed and stressed that a fundamental message to members is to regularly check their benefit statement to ensure there is no missing service, and to contact the employer where there are discrepancies. TP continue to find ways of addressing the missing service issue through campaigns, messages on benefits statements or website messages. There has recently been an employer campaign. Sub-committee members agreed this did not need to stay on the agenda as a standing item. 	IM2/160621
Agenda Item 7	<p>Forward work-plan topic: GMP Equalisation</p> <ul style="list-style-type: none"> JC explained that the consultation on GMP Equalisation had closed in December 2020. TP’s website was updated in March to reflect the outcome. A briefing note was circulated to all staff so that they understood the changes affecting certain members reaching state pension age from 6 April 2021. 	

	<ul style="list-style-type: none"> • The previous “interim” GMP solution has been accepted as the permanent solution, and is therefore BAU. There is a possibility that the recent Lloyds judgment may have a 'read-across' to public service schemes in terms of transfers, but this is still being considered by HM Treasury and they are arranging meetings with the TPS and other public service schemes. • TP will engage with pensioner members through their normal Pensioner newsletters. 	
Agenda Item 8	<p>Forward work-plan topic: Accessibility Guidelines</p> <ul style="list-style-type: none"> • TW reported that TP completed work to comply with the government’s accessibility regulations, that apply to public sector websites, in April. The website complies with Web Content Accessibility Guidelines (WCAG) to Level 2 – AA standard. • The work to achieve compliance was structured based on audits of all public facing content and tackled the 186 issues identified by various tests and audits. • Accessibility testing was carried out using a combination of tools and manual testing. Automated testing was used to identify some areas of non-compliance. A design review was also carried out to correct accessibility design concerns such as font sizing and contrast. • All of the resulting changes were approved by legal and compliance teams. • A new audit has since been commissioned by Capita Consulting, a team independent of the development team working on the site. Their audit report will be presented next week to TP’s Engagement Team and the Department. The audit will be repeated again in 12 months. • JH queried whether there had been any accessibility requests from members. TW advised they had not received any requests from members to receive information in different formats, probably as a result of TP’s own specific accessibility standards. TP always seeks to keep improving, irrespective of the demand, as well as now complying with the new legislation. • MD confirmed that any requests made are highlighted to the Department and reported in the Service Delivery Report each month. MD confirmed there had not been any requests reported to date, MD acknowledged that this had been a good example of proactive working. 	
Agenda item 9	<p>Review of Papers 4, 5 6</p> <ul style="list-style-type: none"> • JH referred members to the quarterly report and questioned whether there was anything that the Engagement Team could do to help reduce member correspondence, and perhaps to help prevent complaints. • JC confirmed that her team works closely with the Operational team, particularly around web-related complaints. Where complaints relate to a communications piece, the team work quickly to improve and adapt the relevant item to help resolve the complaint and prevent similar complaints arising. • JH asked whether webchat not allowing personal conversations still caused complaints. JC acknowledged the challenge with 	

	<p>webchat and confirmed plans are underway for 'live person'.</p> <ul style="list-style-type: none"> • TW confirmed 'live person' will allow members to talk about personal information, however it will not be fully integrated in phase 1 of the development. Phase 1 will mean that members will have to answer some security questions – as they do on the telephone – so that they can have more personal chats. • In the long term, this will be automated because the webchat agent will know that the member has logged on through their MPO account and personal conversations will take place immediately. • PSp mentioned that this was one of a number of initiatives agreed for the contract extension period, with the aim that the service is available before April 2023. • JH referred to OM3 and noted that this is still below target but acknowledged little can be done if members continually fail to engage. JP noted that this could be an age-related issue because younger teachers may not be thinking about retirement. • JH noted the high number of "neither satisfied/dissatisfied" responses and queried if this option could be removed. JC will confirm whether this is possible and/or desirable at the next meeting. KS recalled that this response is part of the toolkit that TP use, and that in some organisations "neither satisfied/dissatisfied" is viewed to be a positive, whereas TP view it as a negative response. • JH noted the positive report about webchat, bulletins, Facebook and so on within the quarterly report. 	IM3/160621
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"> • Goodwin – development of the digital tool ("decision tree") • Cybercrime communications • Transitional Protection communications • Accessibility 	
Agenda item 11	<p>Agree whether any individual papers or presentations should be shared with the rest of the Board for information</p> <ul style="list-style-type: none"> • Accessibility • Goodwin slides 	IM4/160621
Agenda item 12	<p>AOB:</p> <ul style="list-style-type: none"> • There was no other business. 	
Next meeting	22 September 2021 (by Teams)	

Minutes agreed by Chair: *Julie Huckstep*

Date: 18 June 2021

Circulated to sub-committee members on 22 June 2021

To be ratified at sub-committee meeting on 22 September 2021

