

**Information to Members and Communications Sub-Committee**  
**22 September 2021 (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
Jo Cole	TP Engagement Manager	JC
Helen Cowan	DfE TPSPB Secretariat	HC
Kathryn Symms	DfE Policy Team Leader Casework, Correspondence & TPSPB	KS
Sue Crane	DfE Senior Contract Manager	SC
Mark Dutson	DfE Contract Management Team	MD
Jacqueline Garside	DfE Finance Manager (Observer)	JG
Kelly Elliott	DfE TPSPB Secretariat	KE
Apologies		
Ian Payne	Employer Representative	IP

	Item	Action
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 16 June 2021 were ratified.</li> </ul> <p>Matters arising:</p> <ul style="list-style-type: none"> <li>JP mentioned the number of independent schools that had left or were intending to leave the TPS. He noted that HM had previously mentioned their use of ‘fire and re-hire’, but that he was only aware of one employer doing so. He advised that when schools leave the TPS, members’ contracts are adjusted to reflect their new pension arrangements. JP offered to investigate further if HM would like to forward details of other incidents to him.</li> </ul>	
Agenda item 2	<p><b>Review of Actions arising from 16 June 2021 meeting:</b></p> <ul style="list-style-type: none"> <li><b>IM3/160621 – Review of Papers 4,5,6: OM3 – Noted the high number of “neither satisfied/dissatisfied” responses and queried if this option could be removed – SC confirmed that when the contract was set up, a deliberate decision was taken that those “sitting on the fence” would count against TP. Revisiting the OM would take a significant amount of work because of its impact on other areas.</b></li> <li>JH said, when the new contract is being looked at, this could be considered. SC confirmed she would speak to the procurement team.</li> </ul>	IM1/220921
Agenda Item 3	<p><b>Transitional Protection – Update</b></p> <p>JC provided an update on current activities relating to Transitional Protection. Key points include:</p> <p>TP has updated both the member and employer side of the website.</p>	

	<ul style="list-style-type: none"> <li>• FAQs have been restructured into sub-sections based on feedback from unions, front line staff etc, so that members and employers find answers more easily. Information advising that there is not necessarily an answer at this current time due to Government legislation to keep people updated is also included in the FAQs.</li> <li>• Glossary – TP worked with unions, internal front-line teams and policy teams to create a glossary of terms for Transitional Protection. The member forum is used to sense check this, and is amended based on any feedback.</li> <li>• Key messages – there are news stories on social media about the Public Service Pensions and Judicial Offices Bill (in both member and employer bulletins). Also, news stories and a new Valuation sub-section of FAQs on the Discount Rate and Cost Control which is adding a new dimension to Transitional Protection.</li> <li>• The Benefit Statement email campaign included a message on Transitional Protection with signposting to the myth buster factsheet. A very simple flowchart has been produced to alert members as to whether they are affected by the changes.</li> <li>• Social media is used to provide consistent messaging across platforms for new updates and signposting members and employers to current resources. Transitional Protection is consistently Twitter and LinkedIn’s top performing post which often generate positive conversations between members.</li> <li>• Employer training provision helps employers assist their members to understand the changes. There is an online webinar in October.</li> <li>• Website – TP is assessing the format and how this can be improved by identifying information/resources that need to be included. TP will also check how it can improve signposting across the website to the pages on Transitional Protection.</li> <li>• In August, TP received 216 enquiries about Transitional Protection. The four main questions are “Will this affect me?” (significantly highest proportion); “When will I see the changes?”; “What do I need to do?”; and “What is Transitional Protection?”. FAQ headings have been aligned around those subject matters.</li> <li>• Web stats – TP had over 44,000 hits in total by members and over 1,000 by employers. Transitional Protection FAQs attracted 20,000 member views and 672 employers views.</li> <li>• Stakeholders – Examples of TP’s stakeholder engagement work includes a TP facilitated ISBA workshop, the TP Action Forum and the Communications Strategy Group with unions and employers.</li> <li>• Future Communications – TP will review all web content around those who are and are not affected. Members will be encouraged to retire as normal, reassuring members that they will not be worse off.</li>   <li>• SC asked whether paper 7 could be shared with TPARG (Teachers’ Pensions Administrative Review Group) which normally feeds through concerns to the SD&amp;MoD sub-committee. One of the points raised by the group was the importance of clearly communicating to members when their cases will be rectified. The sub-committee agreed this paper would be helpful to assure TPARG, and that it could be shared.</li> </ul>	<p>IM2/220921</p>
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	<p><b>Transitional Protection – Timeline - Paper 7</b></p> <p>JC presented highlights from Paper 7:</p> <ul style="list-style-type: none"> <li>• TP is designing the Transitional Protection communications strategy around key milestones (pages 1 and 2). Some key milestones are linked to government legislation, for example, eg when the Finance Bill enters Parliament. If these dates change, TP will adjust the timeline accordingly.</li> <li>• A key focus is members who will move from the Final Salary Scheme to the Career Average Scheme on 1 April 2022 (agenda item 5).</li> <li>• HMT do not recommend that immediate detriment cases are revisited before legislation is complete because of tax and interest consequences. Therefore, October 2022 is the most likely start date for processing new applications and immediate detriment casework in line with legislation. The timeline reflects that date.</li> <li>• The Engagement team is also linking in with other project contact activities such as Goodwin, BAU, and from an employer perspective, MCR. TP’s engagement team seek opportunities to amalgamate Transitional Protection messages within other project communications so as not to risk overwhelming members.</li> <li>• TP also look for external opportunities to deliver communications. For example, TP has linked into various working groups to provide updated information.</li> <li>• In the “retirement planning” pages of the website, TP has reinforced some key information on Transitional Protection. Flexibilities is a key piece planned for January.</li> <li>• In October 2021, communications about the FS scheme closure will begin. TP and the Department are identifying all the possible scenarios so that members will easily understand what it means for them.</li> <li>• JH queried how members would be contacted who did not have online access. JC assured the sub-committee that all members will be contacted personally, and also through BAU communications.</li> </ul>	
Agenda Item 4	<p><b>Goodwin</b></p> <p>JC provided an update on Goodwin:</p> <ul style="list-style-type: none"> <li>• In July, TP added news stories online about the consultation closing and associated next steps. Working with the project team, they have created disclosure letters to go out shortly. Working groups took place with the Department - on both Transitional Protection and Goodwin - to obtain feedback about the scheme regulations etc. to help in future engagement.</li> <li>• TP has updated all outstanding literature, online resources and web content.</li> <li>• TP has built a decision tree, an online tool to help people understand how they are affected. An excel spreadsheet calculator has been created which will be online with the decision tree tool. A similar decision tree tool will be developed for Transitional Protection.</li> <li>• Internal communications were drafted to support TP staff with any queries they have.</li> </ul>	

	<ul style="list-style-type: none"> <li>• TP continue to update stakeholders through various forums.</li> <li>• Work with the contact centre and digital team is ongoing to establish common questions about Goodwin. 73 calls were received last month, the main questions were “What is Goodwin?”, “Am I affected?” and “When will my pension figures be revised?”</li> </ul>	
Agenda Item 5	<p><b>Transitional Protection communications for the “new scheme” 2022 (Paper 8)</b></p> <p>JC updated members on the highlights of Paper 8. This relates to the change on 1 April 2022, when all members will accrue service in the Career Average Scheme.</p> <ul style="list-style-type: none"> <li>• JC advised that different communications will be needed for different stakeholders – unions, employers, members, employers and TP staff - to ensure everyone understands the impact on the different groups of members.</li> <li>• Some members will have already reached their NPA and some will have been tapered members. Key messages include that the scheme is fair to all, that the FS scheme salary link will apply, the benefits of the Career Average Scheme and its flexibilities, and that NPA will differ from the Final Salary Scheme.</li> <li>• Messages to newer members who are not affected will also need to be considered. Identifying the various scenarios and developing the decision tree tool will help in this respect.</li> <li>• From January, there will be “wake-up” communications for Group 5 members – appropriate to their circumstances. There are 39,000 FS scheme members who have an average age of 62 years - generally already over their NPA. A high proportion of them (85%) have an MPO which will help contacting them.</li> <li>• JH queried if a member who had passed their FS scheme NPA could retire before their state pension age (NPA in CARE). JC confirmed such members can retire whenever they want to, but pensionable service after 1 April will accrue in the Career Average Scheme.</li> <li>• JH suggested that alerting members early to their options would be helpful because teachers generally retire at one of three points in the year. That would give teachers longer to make their decision with all the options properly explained.</li> <li>• JH also suggested that retired re-employed members are also a distinct group of people that need to be considered. JC agreed and will ensure she discusses the scenarios with policy colleagues to help inform messages to this group.</li> <li>• As well as delivering the strategy, TP also need to change much of the BAU information on the website. An audit of the website is ongoing so that references to “if you are in the FS Scheme/if you are in the CARE scheme” will be identified and corrected or removed.</li> </ul>	IM3/220921
Agenda Item 6	<p><b>Review of Papers</b></p> <ul style="list-style-type: none"> <li>• JH queried the decrease in OM 2 and 3 results. SC agreed and is monitoring the figures against the targets.</li> <li>• JH highlighted that the use of Webchat looks very positive. JC reported that ‘LivePerson’ launched in mid-September enabling members to ask personal questions due to the added security.</li> </ul>	

	<p>LivePerson also means members may contact TP via Whatsapp. JC will send more information to the secretariat to be shared with Board members.</p> <ul style="list-style-type: none"> <li>• JH referred to paragraph 41 which highlighted the most successful video post was the benefit statement video.</li> <li>• SC mentioned that 433 items of feedback were received from employers this quarter which was a significant improvement on last quarter.</li> </ul>	IM4/220921
Agenda Item 7	<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>• Transitional Protection and Final Salary Scheme closure engagement plans</li> <li>• LivePerson</li> <li>• Increase in employer engagement</li> </ul>	
Agenda Item 8	<p><b>Agree whether any individual papers or presentations should be shared with the rest of the Board for information</b></p> <ul style="list-style-type: none"> <li>• Paper 7 and 8</li> </ul>	IM5/220921
Agenda item 9	<p><b>AOB:</b></p> <ul style="list-style-type: none"> <li>• There was no other business.</li> </ul>	
Next meeting	15 December 2021 (by Teams)	

Minutes agreed by Chair: *Julie Huckstep*

Date: 27 September, 2021

Circulated to sub-committee members on 28 September, 2021

To be ratified at sub-committee meeting on 15 December 2021