

**Teachers' Pension Scheme Pension Board (TPSPB)  
Information to Members and Communications Sub-Committee**

**23 September 2020 (by Teams teleconference)**

<b>Present:</b>		
Julie Huckstep	Member Representative – Chair	JH
Susan Anyan	Independent Pension Specialist	SA
Heather McKenzie	Member Representative	HM
Ian Payne	Employer Representative	IP
John Pratten	Employer Representative	JP
Kerry Tate-King	TP Head of Engagement	KTK
Tony Watt	TP Digital Engagement Manager	TW
Sue Crane	DfE Senior Contract Manager	SC
Mark Dutson	DfE Contract Management team	
Karen Cammack	DfE TPSPB Secretariat	
Kathryn Symms	DfE Policy Team Leader Casework, Correspondence & TPSPB	KS
Richard Giles	Head of TP (observer)	
Helen Cowan	DfE Secretariat designate (observer)	
<b>Apologies:</b>		
David Butcher	Employer representative	DB

	Item	Action
Agenda item 1	<p><b>Welcome and Apologies:</b></p> <ul style="list-style-type: none"> <li>JH welcomed those in attendance and accepted apologies from DB.</li> </ul>	
Agenda item 2	<p><b>Review of Actions arising:</b></p> <ul style="list-style-type: none"> <li><b>IM6/111219</b> – Valuation (accepted schools). JH noted the update at page 17/18 of Paper 4 and commented that whilst this was still a concern, it remained an area of focus. <b>Action to be Closed and updated via the quarterly report.</b></li> <li><b>IM9/111219</b> – JH noted that the website has been updated to include clarifying information regarding missing service. She thanked those involved in providing clear and useful information. <b>The action to be closed.</b></li> </ul>	
Agenda Item 3	<p><b>Forward Work Plan – Webchat:</b></p> <ul style="list-style-type: none"> <li>TW explained that the background to introducing webchat had been a mixture of a desire to improve customer experience (acting on feedback received via routes such as customer satisfaction surveys and focus group feedback), alongside acknowledgment that this facility is becoming a standard expectation. Introducing the feature was considered a way to both enhance the perception of the TPS and improve TP's Outcome Measure (OM) performance i.e. improve the member experience.</li> <li>It was felt that introducing webchat would help to improve response time to member queries, reduce other forms of contact and improve TP's awareness of issues of concern to members.</li> <li>TP conducted focus groups and analysed feedback from customer satisfaction surveys, working with its webchat partner to scope the project and set expectations. It was noted that the high percentage of members that use mobile devices, the work patterns of teachers and their familiarity with technology made webchat an ideal feature.</li> </ul>	

<p>Agenda item 3a</p>	<ul style="list-style-type: none"> <li>• TP chose the Puzzle platform as it had no suitable internal solution. It was agreed that only general advice could be given because the platform was not sufficiently secure to support personal queries.</li> <li>• Following a successful trial and feedback received, the platform was customised to TP branding, and improvements added such as the ability to print off copies of the chat and an extension to the opening hours. The facility went live in 2019, with supporting promotion, and was added to each of the public-facing areas of the website.</li> <li>• Between 18 September 2019 and 17 September 2020, 93,792 chats were handled with an 88% answer rate. The average time a member spends chatting is 9 minutes, asking questions on a wide range of scheme related topics. The introduction of webchat has had a positive knock-on effect in complaints across a number of business areas and a “rapid response” webchat form has now been introduced to handle member-specific queries which cannot be answered over chat.</li> <li>• In response to HM’s query TW confirmed that as the facility is non-secure, the age profile of participants cannot be captured and measured.</li> <li>• JP asked how many calls could be handled simultaneously – TW advised that each handler can deal with around four calls concurrently and there are up to four handlers operating at peak times (e.g. school break and lunch times) which gives around 16. He noted that the 12% calls abandoned includes members who started the chat inadvertently. Regarding capacity, SC confirmed she was satisfied that the service was healthy, based on abandonment data, but she would provide an update to the sub-committee by email.</li> <li>• JH asked about a potential timeframe for the introduction of confidential chat. SC advised that there is a significant programme of change underway at the moment (including work on Transitional Protection and Goodwin, for example) and careful consideration was required to manage new initiatives such as secure webchat, and the introduction of a similar service for employers.</li> </ul> <p><b>Next topic for March 2020:</b></p> <ul style="list-style-type: none"> <li>• JH invited the sub-committee to put forward suggestions to add to the list of forward work plan topics, and following discussion it was agreed to add: <ol style="list-style-type: none"> <li>1. <u>Adherence to accessibility guidelines</u>. SC explained that this should look at how TP aligns with the government digital guidelines (e.g. accessibility for those with special requirements such as for visual impairment).</li> <li>2. <u>Institute of Customer Service</u>: KTK suggested looking at the work that TP has/is undertaking regarding internal and external surveys with both members and employers. This work would conclude in 2021, so could be added as an agenda item next year.</li> </ol> </li> <li>• It was also agreed that the annual review of the Engagement Plan would be the next forward work plan topic, as the 2021 version would be ready in December.</li> </ul>	<p>IM1/230920</p> <p>IM2/230920</p> <p>IM3/230920</p>
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<p>Agenda Item 4</p>	<p><b>Engagement with employers during COVID-19:</b></p> <ul style="list-style-type: none"> <li>• KTK outlined engagement activities TP has put in place for employers during the current working arrangements. She noted in particular the work being done by TP’s Stakeholder Manager and Employer Relationship Managers and the collaborative approach between TP, DfE and stakeholders.</li> <li>• She highlighted the bespoke website pages providing information e.g. FAQs and guidance on furlough and useful signposting e.g. to the employer support team.</li> <li>• She noted quick changes that had been made to forms to accept digital signatures and a review of processes to provide alternatives where possible.</li> <li>• Regular updates are provided via a range of media including social media and monthly employer bulletins. She advised TP had run a campaign to explain the closure of the employer support line and replaced a number of face-to-face seminars with webinars. These had proved popular and TP plan to run further events as routine feedback (reflected in OM11) was positive. In June, TP had laid on a “drop-in” session for employers, which was also popular so TP plan to continue these. TPAF events later this year will be held virtually, and feedback provided to the sub-committee.</li> <li>• Outcome Measures 9 and 10 had been affected by the closure of the employer helpline, but OM11 has not been affected, reflecting positive feedback to the employer bulletin in particular She felt that the level of positive feedback received was a good reflection of the collaborative work undertaken.</li> <li>• In response to SA’s question, KTK confirmed there will be a soft re-launch of the employer helpline. Testing is taking place this week with a group of 12 employers with a view to re-opening fully next week (with supporting promotion). She undertook to provide some information on the (technical) reasons why the employer helpline could not be supported by remote working.</li> <li>• SA also asked about the historic problem with verifying school email addresses, noting that it may be that information is not reaching the key contacts within some schools. KTK confirmed the on-going activity to try and ensure that school contact data is checked and verified. SC highlighted OM11 which attempts to measure the penetration into the employer community and engagement with them. She advised that tracking allows TP/DfE to monitor employer reach and suggested the sub-committee continue to monitor this OM (alongside OM 2 and 3 via quarterly report updates) to test SA’s point.</li> <li>• JH asked about the profile of webinar attendees and whether this indicated that previous seminar attendees had joined webinars instead. KTK advised that the data profile of historic attendance can be interrogated and will provide an update for the sub-committee.</li> <li>• KTK noted that this may be indicative of a new way of working as employers use the new opportunities provided; she advised this will be considered as an agenda item at the next TPAF meeting, which will be a “virtual” event.</li> </ul>	<p>IM4/230920</p> <p>IM5/230920</p> <p>IM6/230920</p>
<p>Agenda Item 5</p>	<p><b>Review of Papers 3,4 and 5:</b></p> <ul style="list-style-type: none"> <li>• SC highlighted that TP had achieved its millionth MPO registration.</li> <li>• JH noted that at section 5 page 12 of Paper 3 the tracker indicates</li> </ul>	

	<p>that work in/out seems to be flowing well.</p> <ul style="list-style-type: none"> <li>• IP asked about SLA4b which has seen a dip. SC explained this was in relation to legacy backlog issue in bereavements. She noted that the target was a challenging one for TP and that the way the SLA regime works means the case is not counted until it is closed. This means the measure is often impacted by a wait for third party information. She advised that this was an area of focus at the moment and noted that this SLA will come under particular scrutiny by the Service Delivery and Maintenance of Data sub-committee later today.</li> <li>• She did confirm that, as contract manager, she was satisfied that the engagement team co-ordinate closely with the operational teams regarding the timings of campaigns and are aware of operational pressures.</li> <li>• SC drew attention to Paper 4 page 5 and OM 2+3. She noted that the current data showed a very similar picture to the report prepared for the March TPSPB meeting, illustrating reassurance regarding the reach to members.</li> <li>• She also highlighted OM10 that indicated the dip in employer satisfaction.</li> <li>• IP queried SLA 8 asking if there was any significant debt from the independent sector due to cash-flow problems. KS undertook to provide IP with some specific data on independent schools by email.</li> <li>• JH highlighted Paper 4, page 9 para 40, illustrating that whilst the numbers are low, TP is engaging in a range of social media platforms to engage with members.</li> <li>• SC noted that there were no issues on Paper 5 (issues log) for this sub-committee to focus on. However, in relation to Paper 3 (dashboard), work on Transitional Protection (immediate detriment cases) would generate some engagement issues which the sub-committee would wish to monitor.</li> </ul>	IM7/230920
Agenda Item 6	<p><b>Agree Key Issues from the Meeting / Report to highlight at the October TPSPB meeting:</b></p> <p>The sub-committee agreed that the top three issues to take to the next TPSPB would be:</p> <ul style="list-style-type: none"> <li>• An overview of the webchat presentation</li> <li>• Employer Engagement</li> <li>• Outcome Measures 2 and 3 – key engagement measures.</li> </ul>	IM8/230920
Agenda Item 7	<p><b>Agree whether any individual papers or presentations should be shared with remaining Board members:</b></p> <ul style="list-style-type: none"> <li>• It was agreed that the webchat presentation should be shared with other TPSPB members.</li> </ul>	IM9/230920
Agenda Item 8	<p><b>AOB:</b></p> <ul style="list-style-type: none"> <li>• SC advised that in line with the government digital guidelines, TP will be putting an accessibility statement onto its website. Details will be shared with this sub-committee.</li> </ul>	IM10/230920
Next meeting	9 December 2020 (by Teams)	

Minutes agreed by Chair: *Julie Huckstep*

Date: 8 October 2020

Circulated to sub-committee members on 8 October 2020

Ratified: sub-committee meeting 9 December 2020