**TPSPB report – May 2018 to July 2018**

The purpose of this document is to advise the sub-committees and the TPS Pension Board (TPSPB) of recent key activities relating to the administration of the scheme to assist with its assurance role. 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.

**Teachers’ Pensions Contact Centre**

1. Teachers’ Pensions has a very specific remit to interact with members and employers effectively, whilst delivering a complex scheme. The contact centre offering is unique to and specific to TPS members’ and employers’ needs, so the service offered needs to be responsive, effective and adaptable. As a result of TPSPB challenge, the department and TP have further considered how a good standard of service can be defined.
2. When considering a good standard of service, the department employ a range of indicators measuring responsiveness and quality/effectiveness. The SLA and Outcome Measure regime defines the benchmark expectation for service delivery; the department use the monthly Service Delivery Report statistics and narratives to measure performance against these. The performance measures are set out in the table below (with data for the last quarter).

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|  | **Feb**  **18** | **March**  **18** | **April**  **18** | **May**  **18** | **June**  **18** | **July**  **18** |
| Calls Answered | 30960 | 30390 | 35702 | 34308 | 32249 | 31520 |
| Calls answered % | 96.2% | 96.3% | 95.7% | 97.4% | 98.3% | 97.2% |
| Average handling time  (seconds) | 367 | 369 | 372 | 363 | 360 | 360 |
| Average queue time  (seconds) | 39 | 24 | 27 | 36 | 22 | 11 |
| Average speed of answer  (seconds) | 45 | 43 | 49 | 37 | 23 | 31 |
| Telephony complaints | 13 | 10 | 9 | 16 | 23 | 10 |
| Outcome 5  Satisfied | 73.74% | 74.80% | 71.61% | 71.61% | 72.27% | 72.80% |

1. The table below details the telephony performance metrics over the last 12 months (SD6/200618 refers). This information is provided using the Avaya telephony service used by TP.
2. Performance Metrics for last 12 months

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|  | **Aug**  **17** | **Sept 17** | **Oct**  **17** | **Nov**  **17** | **Dec**  **17** | **Jan**  **18** | **Feb**  **18** | **March 18** | **April**  **18** | **May**  **18** | **June 18** | **July**  **18** |
| Calls Answered | 21836 | 17888 | 19951 | 28412 | 25068 | 39592 | 30960 | 30390 | 35702 | 34308 | 32249 | 31520 |
| Calls answered % | 46.5% | 37.6% | 41.9% | 72.3% | 96.2% | 93.8% | 96.2% | 96.3% | 95.7% | 97.4% | 98.3% | 97.2% |
| Average Handling time | 384 | 419 | 434 | 367 | 302 | 352 | 367 | 369 | 372 | 363 | 360 | 360 |
| Average Queue time | 547 | 501 | 504 | 277 | 25 | 108 | 39 | 24 | 27 | 36 | 22 | 11 |
| Average Speed of Answer | 272 | 256 | 221 | 69 | 37 | 94 | 45 | 43 | 49 | 37 | 23 | 31 |
| Telephony complaints | 144 | 194 | 116 | 47 | 14 | 12 | 13 | 10 | 9 | 16 | 23 | 10 |
| Outcome 5  Satisfied | 63.45% | 58.75% | 56.04% | 69.92% | 80.27% | 78.69% | 73.74% | 74.80% | 71.61% | 71.61% | 72.27% | 72.80% |

1. TP are now collecting more data on reason for contact, and using that alongside data on outcomes to identify: trends; pressure points; potential risks and the opportunity to proactivity mitigate those. The department is monitoring how this is ensuring flexibility, and the Board will continue to receive suitable reporting (see paragraph 47 for reasons for contact).
2. The current position is that the challenges faced in the contact centre over the course of last year have been addressed and performance remains at a stable level. The future challenge is to ensure performance remains good, the service is responsive to changing trends and that customers are suitably persuaded to use the communication channel best suited to their needs.

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| **SLAs & KPIs** |  |

1. The overall SLA and KPI performance in the quarter has remained stable notwithstanding the challenges still faced in bereavement (SLA4); transfers (SLA 5 & 6) which is impacted as processing and completion of aged cases continues; Change of Entitlement (SLA 3); and correspondence (KPI 2).
2. Aged case revisions within SLA 3 continue to be a priority. However, work has slowed on this due to the volume increase TP have seen throughout June and July. TP have prioritised in-target work over aged cases to mitigate a further increase in the outstanding workload. As at July, there are 757 revisions outstanding for 2017 and 922 for 2018.

1. TP have been tasked with providing more details of the type of cases included in KPI2 (correspondence) as the outstanding volume of cases continues to increase.  The early indications are that the cases will include transactions that do not impact benefits, like password re-set requests, which have actually been dealt with, but the subsequent IT action has not been taken to close the correspondence down.  TP have also been asked if cases can be identified for prioritisation.
2. Progress on these cases has been impacted by: work on bereavement cases; dealing with the September retirement cases; and increased activities associated with the rise in member numbers. TP have been challenged to produce a recovery plan for these cases and to review the KPI and outcome measures to ensure that these take appropriate account of all live cases.
3. DfE are also monitoring the Transfers In and Out SLA performance closely. TP are maintaining a good general performance level with SLA5a Transfers In – Member notification of Service Credit: Transfer-in calculation, achieving 100% performance. However, there are some areas that require attention, particularly:-

* 5b Transfers In – Payment Receipt: Member record updated.
* 6a Transfers Out – Receipt of Transfer Out request.

In both cases TP are working on aged cases. This will continue to impact on SLA performance over the coming few months until the build-up is fully addressed.

**Bereavement cases**

1. We are pleased to confirm that the Bereavement Recovery Plan with respect to pre-2017 death cases has been completed. As these cases have been actioned/closed in this period (and after the period in which they were received), they adversely affect SLA performance for this period. TP.1.038 issue refers.
2. Only cases which require further information are now outstanding and, for all these cases, a full review has been conducted to understand the information required, the length of time the information has been outstanding and the reminder actions which have been taken. This will prompt further action to seek out the information required.
3. The moves taken recently to measure definitive elements of performance within this SLA (SLA 4) is aimed at ensuring there is a clear view of what is a good standard of service and we measure achievement against that. The measures are:-

* 4a: Death/Ill Health – initial contact/assessment of benefit: 100% within 3 Working Days of receipt of the application form.
* 4b: Death/Ill Health benefit payments (continuing entitlement): Ill Health/Death cases with a continuing entitlement - 100% within 7 Working Days of receipt of the completed application form.
* 4c: Death/Ill Health benefit payments (no continuing entitlement): Member Death/Ill Health no continuing entitlement - 100% within 10 Working Days of receipt of the completed application form.

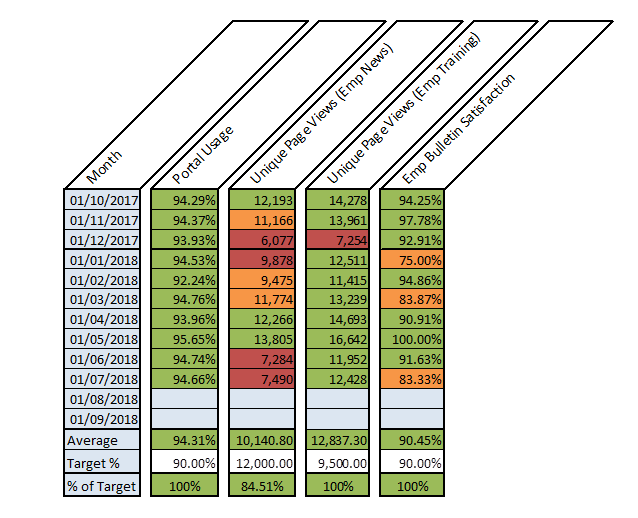
**Impact of increase in members**

1. There has been an increase in the number of members over the life of the contract, particularly in deferred and pensioner members, which has impacted on the amount of administration activity involved in delivering the service. DfE has recognised that a contractual trigger has been reached in relation to the increase in member numbers and a commercial proposal is with DfE for consideration (Issue TP.I.0037 refers). Annex 1 provides member data.
2. We are working to address the issues that are holding up clearance of this proposal. In the meantime, DfE continue to work with TP to ensure issues are being addressed effectively and existing resources used to best effect.

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| **Outcome measures** |  |

1. In the period, 26,406 items of feedback were received from members and 1,147 items of feedback were received from employers.
2. Achievement against targets are set out in the table below and has been good generally. However, it is clear that TP will not achieve OM6 (Members who contact the Teachers' Pension Scheme about their pension are satisfied with the timeliness and quality of the response). This is due largely to the build-up of cases in some areas which has led to lower satisfaction rates. These areas have/are being addressed, as covered above, but would benefit from agreement on the contractual change notice on increased member volume.
3. DfE has also taken steps to ensure increased visibility over performance that impacts this this OM measure, with enhanced reporting of the areas in which build-ups occurred to identify and manage risks early.

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| **Outcome Measure** | **Description** | **Achievement in quarter (May to July)** | **Achievement Year 7 so far** | **Year 7 target** |
| 2 | Members understand the value of their Teachers’ Pension  **Engagement** | 98.04% | 98.12% | 92% |
| 3 | Members are actively planning for their retirement  **Engagement** | 85.43% | 86.65% | 86% |
| 5 | Members regularly receive information about their pension and are satisfied with its quality  **Service Delivery** | 67.42% | 70.32% | 78% |
| 6 | Members who contact the TPS about their pension are satisfied with the timeliness and quality of the response  **Service Delivery** | 69.97% | 68.68% | 78% |
| 7 | Recently retired members are satisfied with the support they receive from Teachers’ Pensions as they planned retirement.  **Service Delivery** | 75.31% | 69.21% | 80% |
| 9 | Employers are satisfied with the service they receive from the Teachers' Pension Scheme  **Service Delivery**. | 87.09% | 92.13% | 80% |
| 10 | Employers receive timely and accurate responses from the Teachers' Pension Scheme.  **Service Delivery** | 73.96% | 79.52% | 80% |

1. Engagement contract Outcome 11 for contract year 7: 1 October 2017 to 30 September 2018 
2. OM14 results contract year 7 to date

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| **Customer satisfaction** |  |

1. Negative feedback in the period centred around two areas: delays and website, including My Pension Online (MPO) registration. Delays in correspondence, pensions on divorce and repayments were the most common areas for which members provided TP with commentary. Website navigation and accessing MPO remain regular trends. The benefit from the latest development in relation to logging into the website has not yet led to improved feedback; however it is still early days since the change was introduced. Planning is still underway for improvements to the overall navigation of the website.
2. There was plenty of positive commentary about the Contact Centre and comments include: “I was very impressed by the deference and courtesy I received”; and “I was very happy – the adviser was knowledgeable and professional”.
3. TP record all complaints and assess whether the complaint is about the administration of the Scheme or some other aspect (such as regulations). The 2018 trend is 56% of complaints are upheld and 44% not upheld.
4. In May, TP received 435 complaints, in June 437 and in July 356. Over the period, the main subjects were delays, bereavements and correspondence. In July, the highest categories for complaints were:

* Employer – 19% (69) (this is member complaints about employers);
* Correspondence – 17% (61); and
* Repayments – 11.5% (41).

1. Of the 69 complaints that were employer related, the three main drivers were: opting-out; auto enrolment; and missing service. Correspondence and repayment complaints were due to delays in response or action. We continue to address the aged cases outstanding in both of these areas.
2. TP have conducted focus group research activity and telephone communications, including holding a Comms Strategy Group Meeting on 10 July, with Unions and Employer Groups, and three employer workshops regarding employer portal research. The next Focus Group is taking place on 26 September in Leeds, with both member and employer sessions taking place.

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| **TPR Engagement** |  |

1. TPR engagement continued across the period. In July, seven employers were reported for having contributions over 90 days old outstanding. Five employers have issues with contributions from multiple months and the remaining two having one month outstanding over 90 days old. The five establishments yet to submit their EOYC for 2015-16 were again reported to tPR who is in the process of writing to them directly. In addition, all 23 employers still to submit their 2016-17 audited return were reported (this is down from 78 employers at the start of the period).

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| **Service Improvements** |  |

**RMH Replacement**

1. The project to move from the existing IT environment (RMH) in the Capita data centre to a secure cloud environment hosted by Microsoft Azure is progressing well.
2. A decision was taken at the Quarterly Strategy Board to delay implementation until after the summer retirement exercise is complete. This followed consideration of all the issues and risks involved, including the practicalities to resolve around network connection from RMH. TP will not now be the first Capita entity to migrate, which means that issues that may arise will be resolved before TP’s migration, which is currently scheduled for the end of October.

**Monthly Contributions Reconciliation (MCR)**

1. The objective of MCR is to allow TP to compare the contributions information provided within the MDC file against the service and salary details. This can subsequently be compared against the payment made to TP each month. This replaces the requirement for employers to provide the Monthly Contributions Breakdown Form and will improve data quality.
2. Teachers’ Pensions are using the lessons learnt from the development and launch of MDC. For example, stakeholder engagement has taken place at a much earlier stage so feedback from Employers, Payroll Providers and Software suppliers can be used to help shape the MCR process and template.
3. In addition to existing engagement events, three more were planned for each sector, involving Payroll & Software suppliers, LA Employers and Non-LA Employers:-

* May/June 2018 – Workshop to gather feedback on the proposed process and template.
* September 2018 – Presentation of solution so far and review.
* January 2019 – Presentation and review of “Developer specification” and “Guidance document” for MCR.

1. During the first set of workshops, a suggestion was made that we make use of a small group of stakeholders to hold more regular focus groups. As the solution changed based on the feedback from those first sessions, it became clear that such a group would be useful to the process. A small group was put together, a few from each sector and now meet on a monthly basis using video conferencing facilities at Darlington, Sheffield & London. This allows the team to sense check any changes made as a result of the feedback.

**Guaranteed Minimum Pension Reconciliation and Rectification**

1. The reconciliation project is progressing well, second investigations continue and around 60k cases have been identified as being suitable for HMRC's new automated solution which is expected to be run in mid-September. The remaining cases are being investigated and second queries raised by TP have been fed back to HMRC.
2. Further work is required around planning for the forthcoming GMP rectification exercise and this will continue into October. Planning discussions have taken place around:-

* Timing of rectification – i.e. when will we be in a position to begin and how do we optimise the handling of individual cases to minimise risks.
* Potential to use automated calculation routines to minimise risk of mistakes and need for resource.
* Likely number of members who will contact TP as a result of an adjustment to their pension and how to best prepare for those contacts.
* Additional resource required to deal with queries.

1. A communications letter is being drafted for members whose pension will be amended, to inform them of the reasons and impacts. This is being shared with the Information to Members and Communications sub-committee.

**WebChat**

1. Analysis is currently taking place of contact centre activity to determine query types that can be migrated to webchat. A webchat trial is due for launch from October 2018 in collaboration with Engagement and will run for 3-6 months, with an initial review period at 3 months to evaluate effectiveness and usage.

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| **Data Strategy** |  |

1. This aims to ensure that the TPS continues to have high quality data and remains one of the most innovative and successful public sector schemes. The data strategy encompasses a number of activities, aimed at ensuring we adapt to the changes occurring both within the scheme/pensions environment and externally.
2. Following initiatives such as Monthly Data Collection (MDC), it was identified that Payroll Providers are now a key component/stakeholder within the employer landscape (with the vast majority of employers using a third party provider).
3. Direct engagement now occurs with Payroll and Software Providers to ensure that new initiatives are shared and Providers are aware of their obligations. Guidance is provided for MDC and Monthly Contribution Reconciliation (MCR) to ensure Providers are able to supply Teachers’ Pensions with the required information in the required formats. The result of this can often be better engagement and direct access to experts who understand the payroll data and any known issues or challenges.
4. The MCR project is also a key component of the data strategy. The objective of MCR is to allow Teachers’ Pensions to compare the contributions information provided on the MCR file (previously the MDC file), against the contributions amount paid each month. It utilises improved and intelligent validation routines to ensure the data is correct first time. Where errors do occur, new validation routines will seek to correct or provide clear guidance on corrections. Employers will be informed of any errors and provided with a simple correction process.
5. A revised data strategy is in the process of being drafted to reflect the changes described above and will also reflect advances in technology that can assist TP in collecting and maintaining accurate data.  A Data Improvement Plan will follow that will:

•     Set out the steps to improve scheme data and the objectives.

•     Define in greater detail, the future initiatives to maintain and enhance data.

•     Sets out the outcomes that will be achieved based on the objectives.

•     Define Governance and Reporting.

**MPO adoption**

1. The table below details member volumes and MPO make-up based on the establishments from the report going live:



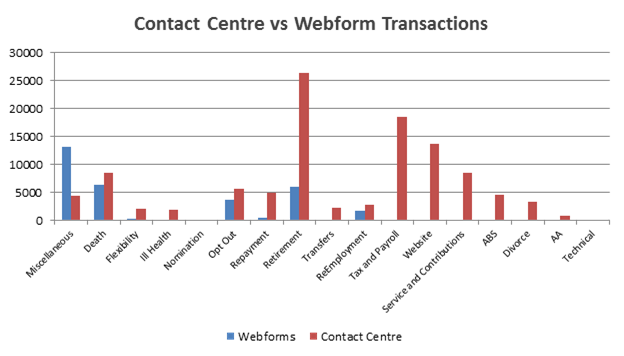
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| **Social Media** |  |

### The scheme has 4,299 Twitter followers and 177,300 impressions, 7,776 Facebook ‘friends’ and 127,770 impressions, and 563 LinkedIn followers and 3,239 impressions. There has been an increase in social media engagement as members contact TP through Facebook and Twitter with their queries.

### YouTube has generated 278,888 views to date and achieved 232 subscribers.

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| **Engagement preferences** |  |

1. The following graph (aggregated to 3 month period) demonstrates the contact centre vs webform transactions by subject.



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| **Cash Income and Expenditure (net cash requirement)** |  |

1. At the end of the July quarter, the cash position reported income as £15.4million (m) under forecast (0.7%), with £2,112m received against the £2,127m expected.

1. Expenditure paid to date was £3,124m - a variance of 1.3% with £41.8m less paid out than expected - against a forecast for £3,166m to be spent.
2. The net cash requirement position at July reported an underspend of £30m (main estimate versus actual) whilst the equivalent resource position showed an underspend of £17m.
3. The Autumn OBR forecasting exercise is underway and on track for delivery by the September deadline.

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| **Contributions** |  |

1. The unallocated contributions balance at July was £59m compared to the £54m reported the previous quarter. Work is ongoing to firstly maintain the position within the 1% tolerance target (against contributions received annually); and ultimately reduce the amount as far as is possible to do so.
2. The breakdown by sector shows the majority is attributable to the following areas - £27.8m to Local Authorities (down from the £28.8m last reported) and £15.4m to Academies (slightly up from the £14.2m last reported).
3. DfE continue to monitor, support and challenge TP on the ongoing position at the monthly finance meetings and senior management KITs.

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| **Debt** |  |

1. **Member Overpayments** – The outstanding balance increased during the period from the £12.9m reported at April to £13.6m at July. The balance consists of £5.2m from re-marriage (of which £3.1m is in recovery), £2m from re-employment, £2m from lump sums and £1.5m from death. Overall £6.6m of this balance is in recovery via repayment plans or future offsets. During the quarter, 2,733 invoices were raised with a value of £3.5m. Over the same period, 2,826 invoices were cleared and £2.9m was recovered.
2. **Arrears of Contributions** – The outstanding balance of member and employer arrears debt was £4.4m, up from £4.1m at January. The balance includes £446k in recovery via agreed repayment plans. Over the quarter, 240 invoices were raised worth £2m with an average cost per case of £8.4k (previously £8.5k). During this time, 260 invoices were cleared worth £1.7m.
3. Although the amount of employer debt remains comparatively low, DfE continue to actively review and challenge TP’s management of the cases as part of the monthly debt review and finance meetings, and in line with the enhanced insolvency processes recently implemented.

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| **Contractor & DfE Costs** |  |

1. The administrative levy (0.08% of employer contributions) has been in place from September 2015. For the period of this report July 2018 (four months), the amount collected from the levy totalled £6.3m.
2. The figures below represent the spend to date in the current financial year (four months).

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| --- | --- | --- | --- | --- |
|  | **YTD Profile** | **YTD actual** | **Variance** | **Narrative** |
| Capita | £Redacted | £Redacted | £Redacted | Invoice due in July not received until August. Some costs profiled have not been invoiced. |
| TPSPB | £redacted | £redacted | -£redacted | Fees, travel and expenses and pension specialist.  Q1 invoice for pension specialist not received until August |
| GAD | £redacted | £redacted | -£redacted | June and July’s invoices not received until August. |
| OH Assist | £redacted | £redacted | -£redacted | July’s invoice not due until August. |
| DfE | £redacted | £redacted | -£redacted | Pensions Team and Finance costs |

**Risk**

1. Valuation: [Members will receive an update on the latest developments and actions being taken to manage the risks and issues involved on 26 September before the sub-committee meetings commence.] HM Treasury draft directions have been received. The planned implementation date of April 2019 is highly unlikely to be achieved. Discussions are taking place with HMT regarding an alternative implementation date, which will need to take account of the length of time that TP and employer payroll providers will need to amend their IT systems in time to reflect the new employer contribution rate and member benefit changes. If implementation is delayed, there could be some form of backdating required for member benefits to April 2019. Government Actuaries Department continue to work on calculations to determine contribution rate.
2. The risk management process remains robust, with regular monthly meetings held between the DfE Senior Risk and Finance Manager, DfE contract Manager and TP Risk Manager, to assess the level and status of active risks, to discuss potential emerging risks and approaches to continuously improve risk management. The latest steps being taken here is to firm up/refresh the position on scheme risk appetite. This will be undertaken over the next quarter in discussion with TP Risk Committee and DfE’s central Risk Management Team, as well as the Quarterly Strategy Board.
3. There are 27 strategic risks under management (29 at last reporting period). Three of the risks have MEDIUM net risk scores and the remaining 24 are LOW. All have a number of existing controls in place and continue to be actively monitored and mitigated.
4. In addition, there are a further 21 operational (service delivery) risks under management (22 at last reporting period). One risk is rated as HIGH. This risk relates to the significant increase in the volume of member engagements and transactions (including data amendments from employers). Ongoing monitoring of the IT service delivery continues. The remaining risks are rated MEDIUM (4) and LOW (16).
5. Business Continuity and Disaster Recovery continues to be reviewed monthly by the Risk Committee. The net risk remains at MEDIUM with controls being reviewed as part of the transition from the restricted IT environment.

**GIA**

1. The Capita Group Internal Audit (GIA) Plan continues to progress well with the table below confirming position against the plan.

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| Overdue 1-30 days: Green; 31-60 days: Amber; 60 days plus: Red | | | | | | | | | | | | | | | | | | |
| Source | Total Open | | | | 0 to 30 days | | | | 31 to 60 days | | | | 60 days + | | | | Trend | |
| C | H | M | L | C | H | M | L | C | H | M | L | C | H | M | L |
| TPS Operations | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | ↓ |

**Progress against 2017/18 Assurance Pl**

## KEY: 1GIA Report Rating: E=Effective; IR=Improvement Required; SIR=Significant Improvement Required; Business Assurance Rating (Aligned to Group Risk Framework): WT = Within Tolerance; AT = At Tolerance; U = Uncomfortable; C = Critical)

| Review Title | Q1 | Q2 | Q3 | Q4 | Current Status | Target Final Draft ToR | | Actual Final Draft ToR | Final ToR | Target Final Draft Report | Actual Final Draft Report | Final Report | E/IR/ SIR/I2 | C | H | M | L |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Capita Group Internal Audit (GIA)** | | | | | | | | | | | | | | | | | | |
| Payment Out Controls | ✓ |  |  |  | Final Report | | Jan 2018 | 24/01/18 | 31/01/18 | Mar 18 | 12/03/18 | 28/03/18 | E | - | - | 1 | 4 |
| Business Continuity / Disaster Recovery |  | ✓ |  |  | Final Draft Report | | Mar 2018 | 20/03/18 | 28/03/18 | Jun 18 | 30/07/18 |  | *IR* | *-* | *-* | *4* | *-* |
| RMH Environment |  |  |  |  | Deferred | | Review ‘Deferred’ into 2019 Plan to review encompass new environment and replaced with DfE requested review of Exit Transition Plan scheduled for Q4 | | | | | | | | | | |
| Member Experience (Contact Centre) |  |  |  | ✓ | Planning | | Oct 2018 |  |  |  |  |  |  |  |  |  |  |
| Exit Transition Plan |  |  |  | ✓ | Planning | | Sep 2018 |  |  |  |  |  |  |  |  |  |  |
| GIA Annual Assurance Statement (2017 / 2018) | ✓ |  |  |  | Final | | N/A | N/A | N/A | N/A | N/A | N/A | N/A | - | - | - | - |
| **CES Head of Business Assurance Activity (HoBA)** | | | | | | | | | | | | | | | | | | |
| CES AAF 01/06 (KPMG) | ✓ |  |  |  | Final Report | N/A | | N/A | N/A | N/A | N/A | 30/04/18 | N/A | - | - | - | - |
| Contract Outcomes |  |  |  | ✓ | Final Report | Sep 2017 | | 28/09/17 | 09/10/17 | Nov 17 | 17/01/18 | 07/02/18 | AT | - | - | 5 | 2 |
| 2nd Bite PI Remediation |  | ✓ |  |  | Final Report | Mar 2017 | | 05/04/17 | 09/05/17 | Jun 17 | 03/04/18 | 30/04/18 | WT | - | - | - | - |
| Quality Reporting |  | ✓ |  |  | Draft Report | June 2018 | | 06/06/18 | 13/06/18 | Jul 18 |  |  |  |  |  |  |  |
| Exception Report Management |  |  | ✓ |  | Planning | Sep 2018 | |  |  |  |  |  |  |  |  |  |  |
| Factor Change Management |  |  |  | ✓ | Not Started | Oct 2018 | |  |  |  |  |  |  |  |  |  |  |
| GDPR (Post Imp) |  |  |  | ✓ | Not Started | Nov 2018 | |  |  |  |  |  |  |  |  |  |  |

Acronyms used within this report:

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| --- | --- | --- | --- |
| BS | Benefit Statement | BAU | Business as Usual |
| EOYC | End of Year Certificate | GAD | Government Actuary’s Department |
| MDC | Monthly Data Collection | MCR | Monthly Contribution Reconciliation |
| MPO | My Pension Online | MAT | Multi-Academy Trust |
| RMH | Restricted, Managed, Hosted (secure) | OBR | Office for Budgetary Responsibility |
| SDB | Service Delivery Board | TPARG | Teachers’ Pensions Administration Review Group |
| TPAF | Teachers Pensions Administration Forum | tPR | The Pensions Regulator |

**Annex 1**

**TPS Membership**

The table below shows the membership of the TPS, as reported in the scheme accounts. The figures for active members include part-time members.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date | Actives | Deferred | Pensioners | Total |
| 31 March 2010 | 658,351 | 426,496 | 567,017 | 1,651,864 |
| 31 March 2011 | 654,545 | 439,723 | 588,441 | 1,682,709 |
| 31 March 2012 | 646,365 | 459,300 | 615,710 | 1,721,375 |
| 31 March 2013 | 667,744 | 452,201 | 636,262 | 1,756,207 |
| 31 March 2014 | 670,543 | 492,683 | 655,829 | 1,819,055 |
| 31 March 2015 | 673,695 | 545,629 | 677,950 | 1,897,274 |
| 31 March 2016 | 692,110 | 555,690 | 695,044 | 1,942,844 |

The methodology for determining the membership of the TPS changed with effect from 31 March 2014. The main change was to the definition of an active and a deferred member. This resulted in fewer members being categorised as active, and more members being categorised as deferred. Notwithstanding this, the overall increase in membership is around 18% over the period (SD3/200618 refers.)