**Teachers’ Pension Scheme Pension Board – 3 June 2015.**

The purpose of this document is to advise the Board of recent member and employer engagement activity, highlight learning and take a forward look.

**Engagement**

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| **Member Satisfaction** |  |

There has been an increase in the number of people stating their preferred channel to communicate with TPS is via the secure on line portal of My Pension On-line (MPO).

Overall, satisfaction levels in February to March improved from 66% in January to 68% by March, only slightly below the target of 69%. Unfortunately the removel of the transfer to DC schemes provision appears to have had a detrimental impact on customer satisfaction levels when using online channels, reducing the overall score in April by 8% points to 60%. The contact centre continues to achieve scores in the high 80%. The key areas for further exploration are the questions relating to ‘satisfaction with the administration of the scheme’ and ‘satisfaction with customer service’ which received low online scores. Further standard exploratory work will be conducted on the verbatim commentary received, to ascertain if there are any trends.

There are no trends in relation to IDRP cases, of which there have been 52 in this period mainly relating to benefits (member and family). A slightly higher number of complaints (704) were received in this quarter which mainly relate to transfers out. There is a possibility that following the changes relating to transferring out to a DC scheme there may be an increase in IDRPs relating to this area.

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| **Member Campaigns** |  |

The levels of interaction with the scheme throughout February to April demonstrate and give confidence that active and retired members with a My Pension On-line account (MPO) are engaged with the scheme (and indeed their pension). For instance, in this period over 43,000 members updated their details via their MPO and there were over 1 million calculator page views. 37,709 MPOs were set up and 10,241 email account details collected.

Website visitors and activity continues to grow with 464,735 visits compared to 356,279 the same period last year, an increase of 30%. This success can be attributed to both the ongoing member campaign activity which has realised, on average, 24% open rate and 11% click thru to the site, and the recent Reform communications. During April we launched a renewed website incorporating reform, additional functionality and navigation improvements, redesigned layouts, renamed and restructured sections and an improved search facility. Thus far the improvements to the site have received approval from stakeholders, employers and members.

An additional challenge is to identify ways of capturing more member email addresses to ensure ongoing conversions to MPO. This will be achieved by ensuring email addresses are collected during all incoming calls and those occasions where other operational areas have touch points with members.

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| **Employer Satisfaction** |  |

Details of employer satisfaction levels are collected on a quarterly basis, the next survey is in June. The most recent results show overall satisfaction levels have declined slightly from the same quarter in the previous year, from 62% to 61%. To identify if this is a one-off or an ongong trend, comparisons will be made with the results from the June survey as well as in- depth analysis of the verbatim commentary.

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| **Employer Engagement and Campaigns** |  |

The Employer Relationship Managers (ERMs) have been focussing on the delivery of Reform related activities, no concerns have been raised by employers about unavailability of ERMs for other activities. Employer engagement levels remain acceptable with open rates of email campaigns ranging from 30% - 48% and enewsletters achieving from 26%-40%, however the Academy population present the biggest challenge. This is due to both difficulties in engaging with them and the high numbers, which are forecast to grow. Operationally there do not appear to be any concerns being raised in relation to this sector causing major issues or errors.

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| **Seminars/Webinars** |  |

This period has seen the successful delivery of 62 seminars and 42 webinars, reaching 823 employers and 2013 delegates and predominantly focussing on Reform; with satisfaction levels of the delegates achieving 80%.

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| **Reform** |  |

As part of the Reform project a Communications Strategy and Action Plan were produced outlining activities to be delivered which would educate and reassure both teachers and employers about the changes. All activities within the plan were given ‘critical success factors’ which were intended to support the ongoing evaluation of the plan by providing measures and benchmarks which could be used to highlight how successful or not the activities were.

Employer engagement with the Reform communications has been very successful.  All large scale employers (1000+ employees) and medium sized employers (500-999 employees) have responded to the communications issued, with 80% of small employers engaging with two of the four agreed criteria. Additional activity is being considered which will be delivered to those smaller employers who as yet have not engaged with TP Reform communications.

Member engagement has achieved successful levels with email campaigns and resources available on the website, such as videos and factsheets, a particularly successful feature over 250,000 factsheets being downloaded and over 74,000 video views.

As a result of this monitoring and evaluation the strategy and plan can be considered as successful. Additionally TPS Operation teams have not seen an increase in the volume of contact from employers or members over the last quarter; this leads us to conclude that the comms activity has provided both audiences with the information they require to meet their obligations.

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| **Forward Look** |  |

Activity will continue to support the achievement of a number of customer experience related measures within the contract known as Outcome Measures (OMs), predominantly those focussing on encouraging members to proactively plan for their retirement. To this end an area of focus will be on activities to establish more MPOs, which should result in an increase in the number of online digital transactions.

A new campaign intended to capture the imagination of new members and encourage them to engage with the scheme earlier, and hopefully set up an MPO, will be rolled out to Newly Qualified Teachers (NQTs). The campaign will include a series of presentations via the Independent Schools Teacher Induction Panel followed by email communications.

The drive to convert members to online customers and introduce them to new channels requires the experience via this channel to not only mirror the brand values but also the customer’s expectations. As TP moves into this online space it is imperative that the internal model adapts at the same pace, thus ensuring the customer experience is a satisfactory one. Current customer satisfaction levels suggest that the online experience is not meeting this, however this could be linked to the transfers issue previously mentioned.

April saw the culmination of Reform activity; ongoing Reform messaging will be incorporated into Business As Usual activity, including automated member emails outlining the member type and highlighting key actions they should consider.

Employers will be provided with a toolkit containing email templates and other tools to help them guide their employees through the changes and the impact upon them as individuals. Additional employer related activity will include other aspects of an employer’s obligations to the scheme, with a focus on harder-to-reach employers. The intention is to support the operation by ensuring that employers understand fully what is required of them, thereby reducing errors and delays.

Member presentations will be delivered via Prudential from April/May. As the nominated partner for the Teachers’ Pensions AVC scheme, and with their vast knowledge of the scheme, Prudential are well placed to deliver this activity. Member presentations are generally requested by employers when they have a number of teachers that have asked for information about their pension, or where they have a new intake of teachers.