

Engagement February 2016 – April 2016

The purpose of this document is to advise the TPS Pension Board of recent key activity on engagement with scheme members and employers so as to assist the Board in its assurance role - in particular in the area of communicating information to members. 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

Quarterly update

Activity across the business has been dominated by the demands of the financial year end – specifically relating to the release of Benefit Statements and P60s. The engagement campaigns promoting these events have driven significant and demonstrable increases in both member and employer interaction across a number of engagement channels and contact points, details of which are provided below.

The Annual Service Return (ASR) engagement plan is progressing in line with the agreed schedule. A specific ASR email campaign aimed at employers has been delivered regarding general housekeeping in preparation for the ASR exercise, split according to employer type. Information has also been relayed via the monthly editions of the Employer Bulletin and has been given prominence in communications issued through the employer portal.

Member engagement and campaigns	
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A phased campaign to inform members about the online availability of their Benefit Statement was successfully initiated in March and will continue through to the end of May. The approach has been to target specific member groups with each phased release to allow TP to manage the volume of any potential feedback from members. The campaign has been well received.

A campaign was delivered in April to advise members that their P60 is now available online, and to inform them that from April 2017 this will be the main means of distribution as hard copy mailing will cease. The initial phase of the communication plan has proved massively successful in engaging the membership, with over 33k online views of the P60 via the website. This campaign alone also resulted in 6.5k members registering for a 'My Pension Online' (MPO) account.

Currently only 2k members (out of a cohort of 680k pensioner members) have opted to receive a hard copy of their statement as their channel of choice.

MPO account holder numbers continue to increase, with a total of 438k members now registered. This figure was significantly boosted in April (21.5k members signing up for an account) following the Benefit Statement email campaign directing members to register for an account to access their statements.

Less successful was the 'dormancy' campaign around flexibilities delivered in February. Although this met its generic targets across the group, low open rates for two of the targeted sectors did highlight a lack of engagement with this cohort which will need to be addressed with a more bespoke campaign.

However a follow-up campaign in March aimed at members who had previously taken the faster accrual option, reached twice the number of members than had been anticipated.

In addition the 're-employment' campaign expected to be delivered in March had to be withdrawn as there have been difficulties in extracting system data to accurately identify targeted members. Being a periodic exercise, this will now be rolled forward into 2017.

All other scheduled member communications across the period have achieved their expected targets.

Regular stakeholder engagement meetings have been established with employer and member representatives, led by [REDACTED] (TP). The meetings effectively form a sub-group to the quarterly Teachers' Pensions Administration Review Group (TPARG) and allow lower lying and more detailed issues to be discussed and resolved 'in the moment'. This will allow TPARG to focus on cross-cutting delivery and administration issues being experienced at employer/member level.

Employer engagement and campaigns



As with member communications, employer engagement campaigns have concentrated on promoting the move to online being the default communication channel for Benefit Statements. A coordinated response has been taken to ensure that awareness has been consistently delivered.

Monthly e-bulletins continue to be well received and are consistently hitting their targets for employer engagement.

Although previous iterations had been well received, the launch of the employer toolkit proved less successful than anticipated, with open rates for the latest release falling below expectations. There will be a further release in the next quarter when engagement levels will be reviewed further.

Of greater concern is the low level engagement being seen in response to the 'New employer welcome' email, which is issued to employers when joining the scheme. Although distribution levels are relatively low at present, and the scheme takes assurance from other measures and processes that new employers are aware of their responsibilities (e.g. separate processes ensure new employers are remitting contributions to the scheme), the process is currently being reviewed to improve interest levels.

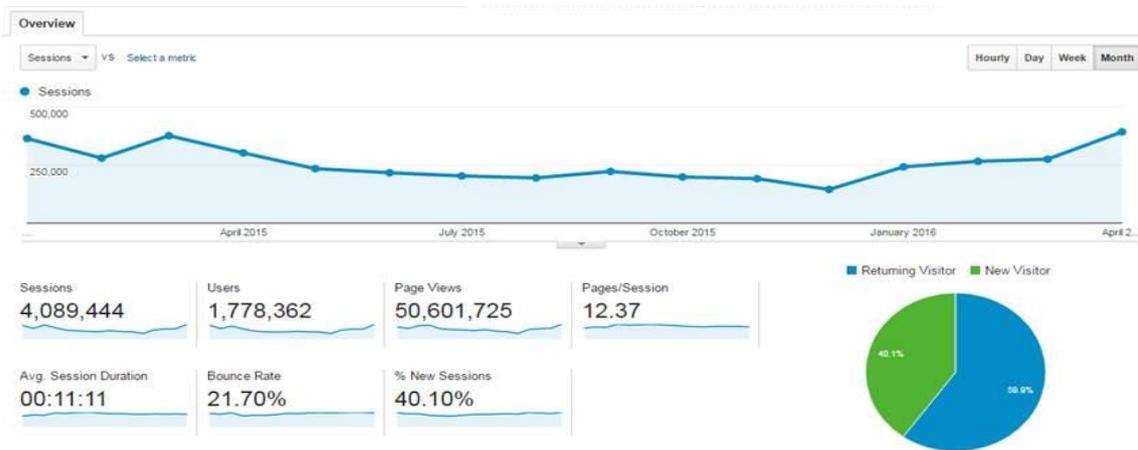
Initial findings suggest that these communications need to be more effectively targeted within the employer, with the farming of contact details for key personnel being critical. As this is predominantly an issue for converting academies, the flow of this information will be considered as part of the review of engagement with department colleagues working on the academy programme.

Website and social media/seminars



The scheme website saw a significant increase in visitors in April (some 391k - up 43% when compared to March) which is directly attributable to the success of the Benefit Statement and P60 campaign activity.

Sessions on the web since April 2015



Web Sessions with a registration



The scheme now has over 1,592 Twitter followers (226 additional followers in April and an increase of 292 in the quarter) and 391 'likes' on Facebook – an increase of 295 in April alone. These significant increases have been the result of a paid media campaign delivered as part of the agreed communication plan.

Five employee seminars (97 registrations) and 11 webinars (74 registrations) were delivered in the last quarter.

With regards to video production for members, an instruction video detailing the process of the BS highlighting key areas of the Statement has been produced. Additionally, four case study videos, three individual members at different life stages (new, mid-career and approaching retirement) and one combination of all three members, are due to be released shortly.

For employers, webinar content has been developed into bitesize video modules to include information relating to starters and leavers (now live), contributions and retirement options. The Annual Service Return video has also been updated to reflect annual changes to the process.

Work to develop the website is continuing in line with the agreed plan. Following a review of the employer and member engagement contract outcomes, TP now receives daily feedback from customers through online surveying while the user is in the process of accessing the website. This measure was previously delivered via the use of an annual survey where customers provided feedback retrospectively. This is improving TP's responsiveness to feedback and, along with analysis of website activity, is providing valuable evidence to drive improvements to the quality and functionality of the website.

A project to launch a specific resource for Newly Qualified Teachers has been in development over the last quarter. The central 'hub' will be accessible through the website as well as focussing communications around social media channels. This was well received by the focus group which fed into the project. The project will be the focus of an ongoing 'paid media' campaign until June.

Forward look	
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Four employer seminars are due to be delivered in May and are already receiving a high level of interest.

Communication regarding the revised Pension Input Period requirements will be finalised for inclusion in member Benefit Statements, and will be shared for information at the next Board meeting. The communications will supplement the employer information currently available through the website.

The Flexibilities Calculator will be launched on the scheme website in June.

A dummy website for internal use will be set up to facilitate testing of revised website content prior to it being promoted into the live TPS website. Updated content will start to go live in Quarter 4.

The Teachers' Pensions Action Forum met on 24 May. The agenda focussed on promoting the scheme's continued move towards digital engagement and

encourage employers to consider the intrinsic benefits, and what they can do to support and improve their working practices. Around 30 employer representatives are attended, representing a range of employers, and initial feedback on the event was good.

A kit meeting will be held with the department's Publishing, Branding and Campaigns Manager on 7 June to discuss shared communication channels and preparation for the scheme 'Marketing exemption' approval, which will need to be cleared by the department in October.