

**Information to Members and Communications Sub-Committee
14 December 2022 (by Teams)**

Present:		
Julie Huckstep	Member Representative – Chair	JH
Susan Anyan	Independent Pension Specialist	SA
Heather McKenzie	Member Representative	HM
Susan Fielden	Employer Representative	SF
John Pratten	Employer Representative	JP
Maria Chondrogianni	Member Representative	MC
Kerry Tate	TP Head of Marketing and Engagement	KT
Tony Watt	TP Digital Engagement Manager	TW
Amy Gibbs	TP Head of Governance and Risk	AG
Jo Cole	TP Engagement Manager (Employer)	JC
Jennie Connelly	TP Engagement Manager (Member)	JCon
Anna-Marie Alderson	DfE Senior Contract Manager	AA
Melanie Phillip	DfE Policy Team Leader Casework, Correspondence & TPSPB	MP
Mark Dutson	DfE Contract Management Team	MD
Helen Cowan	DfE TPSPB Secretariat Manager	HC
Observers:-		
John Brown	DfE Head of Policy Projects	JB
Anna Leonard	DfE Head of Supplier Management	AL

	Item	Action
Agenda item 1	<p>Welcome and Apologies:</p> <ul style="list-style-type: none"> JH welcomed those in attendance. The minutes from 21 September 2022 were ratified. 	
Agenda item 2	<p>Actions from the previous meeting:</p> <ul style="list-style-type: none"> AP1/191022 (referred from TPSPB) – End of Year Certificates (EOYC) – AA assured the Board that when an academy closes or merges into a different MAT relevant action is taken to update contact details and checked against the ‘Get information about Schools’ system. 	
Agenda Item 3	<p>Transitional Protection (to include a demonstration of the Decision Tree)</p> <ul style="list-style-type: none"> TW provided a demonstration of two different scenarios of the Transitional Protection Decision Tree. The first page emphasised what it can and cannot be used for. Users are then asked a number of questions to determine if they are affected by the changes. The ‘Check your answers’ section enables the user to double check their responses. The Decision Tree is currently going through final testing. SF queried if there would be a link to the decision tree on the employers’ part of the website. JC confirmed there would be to enable employers to support their members. JH reflected that the ‘Check your Answers’ section would be helpful to users. 	

	<ul style="list-style-type: none"> • JP queried whether the 'Summary' page contained supplementary questions. JC confirmed that it signposted users to additional fact sheets if they had indicated that they had taken a flexibility or overtime. JP suggested the additional information could be 'highlighted' to make that section clearer within the text. <p>JC discussed Transitional Protection -</p> <ul style="list-style-type: none"> • TP is developing a communications plan for the Decision Tree which will involve a soft launch and subsequent roll out. • All health communications to affected members have been completed, informing members that they only need to contact TP if they do not want to be assessed. • Communications on pension on divorce (POD) have been completed. • A general update was communicated via the member bulletin in October, including signposting users to relevant resources. • A news story was posted on the website to remind users who transitioned from the Final Salary Scheme to the Career Average Scheme on 1 April 2022 of the transfer window. • JH thanked TW and JC for their updates. 	IM1/141222
Agenda Item 4	<p>Annual Review (Engagement Plan 2022)</p> <p>JCon shared a slide pack on 2022 Engagement Review and reported that usage and engagement levels have significantly improved across the website, social media and TP campaigns.</p> <p>Highlights from the presentation include:-</p> <ul style="list-style-type: none"> • The completion of the CIP (Continuous Improvement Project) involving Multi Factor Authorisation (MFA) and member online web forms was a significant achievement for TP. The six new online webforms has provided a more streamlined experience for users. Improved reporting has enabled TP to understand how many people are using MFA and the authentication method used. There are approx. 300,000 members and 4,000 employers using MFA.. • Email remains the most popular communication method for members. • The Employer Portal has been redesigned following feedback from stakeholder and focus groups and will be relaunched next year. • Statistics from January to October demonstrate the effectiveness of campaigns with 5.3 million visits to the website, 51 million page views, 143,542 benefit statement views, 3.5 million calculations via the calculators and 105k video views. Nearly 8% of MPO registrations were from employers using tools on the website to encourage members to sign-up. • Two new campaigns were launched. The 'Death Grant' campaign encouraged members to make/review their nomination and the 'Log In' campaign focussed on members who had an MPO account but had not used it, to encourage them to engage. • The benefit statement campaign was TP's most successful for usage and engagement. 49,515 statements were viewed within the campaign period. Additionally, there were 3,749 MPO registrations, 3,415 video views and 63,152 dashboard views. 	

	<ul style="list-style-type: none"> • Feedback remains important and TP ensure that full testing is completed before implementation. • The Member Forum, which was created two years ago, has approximately 800 members with a representation of active, deferred and referred members split across the UK. • TP have adjusted the ‘Understanding the Death Benefit’ campaign and ‘Contact Us’ pages following feedback from user testing. • Focus groups are now held online and are carried out by an independent company to ensure non-biased opinions. • Website feedback and the employee portal feedback has been a good way to test engagement. Daily customer satisfaction checks enable TP to be proactive and act quickly. Working with the Institute of Customer Services (ICS) and CEM benchmarking organisations enables TP to remain aware of what is happening in the industry. • The TPAF (Teachers’ Pension Action Forum) event is held three times a year for employers This reflects the school terms • Recent social media campaigns on ‘Cost of Living’ and ‘Take a Break’ were well received by users. Facebook is the most engaged platform on social media which has developed into a community enabling teachers to share stories and best practice. • TikTok will be launched next year which will target a younger audience and will focus on sharing resources and bite sized videos. • All engagement targets for 2022 have been met on social media and a new 2023 strategy is being developed. A new Social Media Executive joined the team in September and will dedicate his time and focus on these channels and engagement. • HM referenced media reports that teachers are considering leaving the scheme due to the increasing cost of living and queried what action was being taken to encourage members to remain. JCon referenced the ‘Cost of Living’ campaign which promoted pension, ill health and death benefits of being in the scheme and highlighted TP’s best social media campaign of the year was when they turned genuine responses to a member tweeting whether she should opt out, which were overwhelmingly in favour of remaining in the scheme, into a multi-platform campaign. TP will continue to monitor opt out levels. • MC indicated that members were also opting out in universities and it was important to show understanding when encouraging them back into the scheme. JC confirmed that employers and members who are opting out are provided with information on what will happen and how they can re-join the Scheme if their circumstances change. 	
<p>Agenda Item 5</p>	<p>Engagement Plan 2023</p> <p>JC highlighted that lessons learned, and regulatory requirements were considered whilst developing the Engagement Plan 2023.</p> <ul style="list-style-type: none"> • Key factors included the October 2023 deadline for Transitional Protection, and MCR to ensure alignment with BAU work. • TP vary communications for different member segments and, where possible, external projects are utilised to communicate messages regarding BAU to manage the volume of communications with users. 	

	<ul style="list-style-type: none"> • Whilst social media has provided excellent opportunities to promote the scheme, TP are mindful not to treat campaigns in isolation and to be aware of internal and external influences and operational impacts. • TP recognise the importance of working closely with their operational and policy team and developing good relationships with stakeholders and the Department. • To measure success, the plan sets key goals and achievements, along with a timeline. • For member engagement in 2023, the benefit statement and P60 campaigns are key events. The pension roadmap will coincide with bite sized videos on TikTok covering opting in, transferring in, part-time working and family leave etc. which will coincide with work on the website. • HM confirmed that she had heard reports from different age groups that the video campaigns were very effective so should be prioritised where possible to ensure members were reached effectively. • Plans for employer engagement, employer portal changes being introduced were based on feedback from employers and will align it with MPO which TP anticipate will bring significant benefits. The new 'Contact Us' will enable employers to deliver secure information through the employer portal more easily. • TP will also be providing additional tools and resources to ensure new employers can help their members with issues such as returning from maternity or career breaks. 	
<p>Agenda Item 6</p>	<p>Member and Employer Training Plan 2022-23</p> <p>JC delivered a short presentation -</p> <ul style="list-style-type: none"> • TP have created a training plan which runs from September with regular reviews throughout the year. • An improved booking system for webinars has improved users access and made managing training sessions much easier. Delivery of training via Teams has proved very popular. • TP have delivered 139 webinars of 5,000 registrations with an average attendance of 62%. Enhanced MCR webinars have been most popular, with an average attendance of 71%. • Outcome measures for the contract year last year was at 98% on satisfaction for webinars. There were 4,500 video views across the year and three new videos that walked through the MCR process. A new employer video was introduced in September. Monthly employer drop in sessions covering various topics attracted average attendance of 55% and monthly MCR surgeries are now being held. • Teachers Pensions Action Forum (TPAF) webinars are held every term with four webinars across the day (held on two days in the month) with users being able to attend from their desks so there is no cost involved. An event in November had 73% attendance. • HM queried if there were plans to have face to face training. JC confirmed that TP will continue with the digital approach for 2023 as feedback currently does not show an appetite for face to face, although this will be monitored. 	

	<ul style="list-style-type: none"> • JCon highlighted that there had been little initial interest in member training but feedback from employers had presented a new opportunity whereby TP has direct access to schools and training is delivered on Teams. Questions can be asked in advance of the sessions, which are recorded to allow members to view anytime. TP have also created a dedicated website area. Next steps will be to determine if members have MPO and to send relevant communications encouraging sign-up and training opportunities. • JCon confirmed that TP continue to gather feedback to monitor engagement and questions and will create FAQs resources and campaigns tailored to need. • JH thanked JC and JCon for the update and queried whether this topic should be added to the next year (December) 2023 forward work plan. Board members agreed. 	
Agenda Item 7	<p>2023 Forward Plan (Paper 10)</p> <ul style="list-style-type: none"> • AA proposed workplan topics for the 2023 sub-committee meetings: <ul style="list-style-type: none"> • March - annual executive review, Employer Portal and Contact Us, and 360-degree feedback; • June – MFA, communications, digital update; • September – annual review of social media; • December – annual review of engagement and training plan. • Standing agenda items include Transitional Protection and the communications update, with the supporting papers comprising the quarterly report and the dashboard. • The Board agreed the 2023 forward work plan with a view to revising it should there be any changes. 	
Agenda Item 8	<p>Review of Papers (Papers 4, 5 and 6)</p> <p>Quarterly Report</p> <p>JH noted that:</p> <ul style="list-style-type: none"> • Annual Allowance was completed on time and good communications had resulted in the deadline being achieved. • OM2 (<i>Members understand the value of their Teachers' pension</i>) target was higher than the previous month. OM3 (<i>Members are actively planning for their retirement</i>) was lower than the target although, as this OM is cyclical, it is anticipated the target will be met by year end. • Positive feedback had been received across all platforms regarding communications on cost of living. • MCR is coming to the end of the replan process and is moving to final commercial arrangements. Communications have been suspended while onboarding focusses on the suspense account and will start again in the New Year. • The number of employers leaving the scheme has plateaued although any changes in the SCAPE rate in 2023 may affect this. <p>Issues Log</p> <ul style="list-style-type: none"> • JH highlighted that the original backlog of 160 ill health retirement cases had been cleared but there is a further backlog of 120 cases since 1 	

	<p>August. The casework team are monitoring these daily and a long-term solution is being worked on.</p> <ul style="list-style-type: none"> • JH also advised when users ring the contact centre regarding ill-health they are directed to a specialist team. 	
Agenda Item 9	<p>Agree top 3 issues from the meeting/report to highlight to the next TPSPB</p> <ul style="list-style-type: none"> • Transitional Protection Decision Tree • Member and Employer Training Plan • Cost of living – high inflation impact in communicating with members 	
Agenda Item 10	<p>Agree whether any papers or presentations should be shared with the rest of the Board for information</p> <ul style="list-style-type: none"> • Board members agreed that all presentations would be shared with the rest of the Board. (Paper 7, 8 and 9) • JH asked that a link to demonstrate the Decision Tree could be sent to Board members. TW said he would share this. 	<p>IM2/191222 IM3/191222</p>
Agenda item 11	<p>AOB:</p> <ul style="list-style-type: none"> • HM thanked Julie on behalf of the Board for all her hard work and contribution to the sub-committee and wished her well for the future. 	
Next meeting	22 March 2022 via Teams	

Minutes agreed by Chair: Julie Huckstep

Date: 20 December 2022

Circulated to sub-committee members on 20 December 2022

To be ratified at the 22 March 2023 sub-committee meeting.