

**Information to Members and Communications Sub-Committee**  
**24 March 2021 (by Teams teleconference)**

<b>Present:</b>		
Julie Huckstep	Member Representative – Chair	JH
Susan Anyan	Independent Pension Specialist	SA
Heather McKenzie	Member Representative	HM
John Pratten	Employer Representative	JP
Peter Strike	Member Representative	PS
Kerry Tate-King	TP Head of Engagement	KTK
Jo Cole	TP Engagement Manager	TW
Sue Crane	DfE Senior Contract Manager	SC
Karen Cammack	DfE TPSPB Secretariat	CK
Kathryn Symms	DfE Policy Team Leader Casework, Correspondence & TPSPB	KS
Helen Cowan	DfE TPSPB Secretariat	HC
Matthew Barrow	DfE Exit Transition Manager (Observer)	MB
Zaheer Patel	DfE Contract Manager (Observer)	ZP
<b>Apologies:</b>		
David Butcher	Employer Representative	DB
Ian Payne	Employer Representative	IP
Mark Dutson	DfE Contract Management team	MD

	Item	Action
Agenda item 1	<p><b>Welcome and Apologies:</b></p> <ul style="list-style-type: none"> <li>JH welcomed those in attendance.</li> <li>DB, IP and MD sent apologies.</li> </ul> <p><b>Minutes:</b></p> <ul style="list-style-type: none"> <li>Members agreed the minutes of 9 December 2020 as an accurate record.</li> <li>There were no other matters arising.</li> </ul>	
Agenda item 2	<p><b>Review of Actions arising from 9 December 2020 meeting:</b></p> <ul style="list-style-type: none"> <li><b>IM1/091220</b> – Update on Webchat (abandonment data) – KTK advised that the data that Puzzel provides falls across 63 categories, with 30 additional categories on aging information. There are different performance metrics available, however, most are not as useful as what is reported at present.</li> <li><b>IM2/091220</b> – Transitional Protection/Immediate Detriment – Glossary – KTK confirmed that JC is working with colleagues in the Policy and Technical (PAT) team on the ‘myth buster’, aiming for completion within the next two weeks. JH mentioned that it is important that members/employers are aware of the work that is being undertaken in the background, and that immediate detriment communications will be covered more fully under Agenda Item 3.</li> <li><b>IM6/230920</b> – Quarterly Report – OM2 – KTK explained that the target of 92% is being met, but over the last 3 months the actual response rate for surveys is 20%. Although TP is above-target,</li> </ul>	

	<p>she will discuss with DfE how to improve the response rate.</p> <ul style="list-style-type: none"> <li>• <b>IM7/091220</b> – Quarterly Report (OM2&amp;3) monitoring of statistics – (as above).</li> <li>• <b>IM8/091220</b> – Quarterly Report (page 7) - unique page views have gone down. SC advised that the target is 21,500, but in January there were 19,000 views and in December 14,700. She is meeting with TP to look at the OMs again, particularly in terms of the mechanism that is used to pick up responses from employers. SC will present an update at the next sub-committee meeting.</li> <li>• <b>IM9/091220</b> – Quarterly Report – Missing Contributions - Webchat and social media – KTK has spoken to contact centre colleagues who advised that members are asked to contact their employer in the first instance. If the school has closed down, they are advised to contact the LA and/or HMRC who will provide a report to show that contributions were deducted.</li> </ul>	IM1/240321
Agenda Item 3	<p><b>TP Tracking – Communications Strategy</b></p> <p>JC provided an overview of the past three months' activities to the sub-committee. Key points include:</p> <ul style="list-style-type: none"> <li>• As soon as the Transitional Protection consultation response was published, TP issued communications to inform members, employers and stakeholders. For example, emails, web news stories, social media, additional FAQs and fact sheets providing a shorter version of the response were issued.</li> <li>• Emails were sent to all active/deferred members. Key messages included what the changes were, who was affected, and being clear as to those people not affected by the changes.</li> <li>• Terminology – TP and the department have been working with HMT and HMRC to look at terminology and where this differs between schemes/departments. TP endeavours to use and explain both versions to assist member understanding - for example, career average scheme and reformed scheme.</li> <li>• TP has been monitoring responses, working with the digital team and speaking to the contact centre. The queries and hits on the website are quite low compared to the number of emails sent out to members.</li> <li>• Social media has been very positive with no negative comments to address and good performance on posts on Facebook, Twitter and LinkedIn.</li> <li>• TP has been working with stakeholders to get feedback and provide further presentations about Transitional Protection. They hosted a Communications Strategy Group with employer groups and unions.</li> <li>• There is an online LGA conference next week, with TP and DfE presenting.</li> <li>• TP's Teachers' Pensions Administration Forum (TPAF) event is fully booked, hosting two sessions on Transitional Protection.</li> <li>• Next steps include working on the communications strategy, progressing to a final review and timeline. This will align with all</li> </ul>	

	<p>relevant projects and BAU, to ensure consistent messages on key priorities are being delivered.</p> <ul style="list-style-type: none"> <li>• TP has signed off a factsheet for an update on Cost Cap, due to be published online.</li> <li>• KTK added that the DfE weekly discussions have been invaluable, and positive feedback has been received from unions and stakeholders about the range of communications provided. There has also been a milestone review with the DfE regarding lessons learned.</li> </ul>	
Agenda Item 4	<p><b>TPSPB Executive Review</b></p> <ul style="list-style-type: none"> <li>• KS explained that at the end of each financial year, an Executive Summary is published on TP’s website and provided to Minister Gibb for his information.</li> <li>• The document represents the work and activities of the Board over the last year. The full version is shared with ministers and an abridged version is published on TP’s website, and is available to board members to share as required.</li> <li>• The sub-committee agreed that the Executive Summary should be presented as the final version to the Board in April.</li> </ul>	IM2/240321
Agenda Item 5	<p><b>Forward work-plan topic: Independent Schools</b></p> <p>JC led the sub-committee through work TP has delivered in relation to Independent Schools. The issue of some independent schools leaving the TPS has arisen because of an increase in employer contributions. DfE is working on a proposal to allow independent schools to have a phased withdrawal from the scheme (i.e. current staff stay in the scheme, but new staff join an alternative pension scheme). Key points include:-</p> <ul style="list-style-type: none"> <li>• Bespoke work has been undertaken following an increase in independent schools leaving the scheme since September 2019. TP provided information to employers on the consultation exercise, provided information on contribution changes and delivered information on contractual requirements for employers if they did not offer the TPS, and what members needed to understand if they left the scheme.</li> <li>• Employer engagement – TP informed and advised using bespoke emails, news stories and bulletins to provide information on the process. If an employer notifies TP that they no longer want to participate in the scheme, TP provide full details of what they need to do, providing a step-by-step checklist to follow.</li> <li>• Member engagement – TP engage with all members whose school is leaving the scheme. This comprises regular communication and information packs on next steps. There have been a couple of challenges where an employer has contacted TP to say they are not leaving the scheme, but a member has received a letter. JC confirmed that this happens where the member has recently worked at a school that is leaving the scheme.</li> <li>• There is additional engagement both on the employer and member sides of the website, adding more bespoke web pages around ‘work-events’. There is an opportunity through the employer bulletin</li> </ul>	

	<p>to reinforce the benefits of the TPS. It was agreed that it would be useful to work with stakeholders such as ISBA to see if there is anything pertinent to add to websites around Independent Schools.</p> <ul style="list-style-type: none"> <li>• TP is working with the DfE on phased withdrawal from the scheme and waiting confirmation of the date. TP will provide specific communications at that time to ensure employers understand what will be delivered, what they need to do; and for existing and new members - how it will work for them.</li> <li>• JP asked if ISBA had invited TP to online webinars as they would be useful for communications. JC confirmed that her colleague Barry Bailie has been working closely with John Murphy. She mentioned that she would speak to Barry to see how progress can be made and how TP can be involved.</li> <li>• JP confirmed that a further 97 schools are considering withdrawal from the scheme. He reported that 36% of teachers are now actively engaging with their pension. ISBA are keen to get information to send to members.</li> <li>• HM mentioned there is still real concern about information not being clear and that there is scaremongering, in relation to the impact of McCloud, in encouraging Independent Schools to withdraw, therefore it is essential information is full and transparent on both sides.</li> <li>• JP stressed that he wanted to make sure that the information to members was correct. He mentioned that he would speak to ISBA as he felt this information on scaremongering was concerning.</li> <li>• PS queried the engagement with the post-92 university sector as he felt there were similar issues. KS explained that universities are required to use the TPS whereas for independent schools there is a choice.</li> <li>• KTK reiterated the importance of members having an MPO account so that they receive relevant communications directly. TP is looking at how they can communicate and refresh engagement to make sure members receive crucial information.</li> <li>• SC suggested that the sub-committee might find it useful to focus on data on regarding MPO take-up at independent schools vs other sectors. She agreed to reflect on the information held on this to allow consideration at the June sub-committee meeting.</li> <li>• JH referred to paper 7 and asked for comments, in particular to around assuring themselves that the current and planned communications to employers and members are sufficient. The sub-committee were satisfied with the presentation content.</li> <li>• JP stressed that Independent Schools would stay in the scheme if they were able to afford it. The latest increase in employer contributions, which coincided with the pandemic, has put additional financial pressures on schools, particularly smaller schools.</li> <li>• HM expressed concerns for the longer-term effect on the scheme and the importance of ensuring all sectors do the best for their members.</li> <li>• There was some discussion regarding future engagement with the university sector. PS suggested UUK as the most appropriate organisation to liaise with. JC confirmed that Barry Bailie is the lead on stakeholder engagement and that she will liaise with him. PS advised he would be happy to help out.</li> </ul>	<p>IM3/240321</p> <p>IM4/240321</p> <p>IM5/240321</p>
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	<p><b>Agree topics for the rest of the year</b></p> <ul style="list-style-type: none"> <li>JH directed sub-committee members to Paper 9 and discussed suggested topics for forthcoming sub-committee meetings. Sub-committee members agreed with the proposed plan for the year ahead, and JH suggested that next year's topics be discussed in December.</li> </ul>	
Agenda Item 6	<p><b>Review of Papers 4, 5 and 6</b></p> <ul style="list-style-type: none"> <li>JH referred to the Quarterly Report (Paper 5)</li> <li>She queried paragraph 54 regarding communications on Goodwin and asked for an update at next sub-committee meeting. It was also agreed that Goodwin would become a standing agenda item.</li> <li>JH highlighted there is more feedback from members than employers. SC/KTK confirmed that this is being dealt with in conversations with TP and DfE to increase feedback from employers.</li> <li>Page 17, paragraph 78 - website accessibility – SC mentioned TP has not received any requests from members for different formats. KTK noted that an important project milestone had been reached last week which would now lead to the annual review.</li> <li>KS asked for preferences about circulation of papers. The sub-committee agreed sending minutes and Board-relevant papers twice was acceptable - given the papers are sent digitally.</li> </ul>	<p>IM6/240321</p> <p>IM7/240321</p>
Agenda Item 7	<p><b>Agree top 3 issues from the meeting/report to highlight to the next TPSPB</b></p> <ul style="list-style-type: none"> <li>Independent Schools</li> <li>Executive Summary</li> <li>Goodwin</li> </ul>	
Agenda Item 8	<p><b>Agree whether any individual papers or presentations should be shared with the rest of the Board for information.</b></p> <ul style="list-style-type: none"> <li>Independent Schools</li> <li>Executive Summary</li> </ul>	<p>IM8/240321</p>
Agenda Item 9	<p><b>AOB:</b></p> <ul style="list-style-type: none"> <li>SC noted that the HMT and HMRC policy decisions that have led to a re-planning of the Transitional protection work has been added to the issues log to allow it to progress formally.</li> </ul>	
Next meeting	16 June 2021 (likely to be via Teams)	

Minutes agreed by Chair: *Julie Huckstep*

Date: 26 March 2021

Circulated to sub-committee members on: 6 April 2021

Ratified at the June sub-committee meeting: 16 June 2021

