

Agenda item 7: Forum engagement and the Payments Community

Executive Summary

The Forum Communications Strategy

In July 2015, the Forum Secretariat developed a communication strategy for the Forum¹. The strategy puts in place a communications roadmap that follows the development of the Forum in a pragmatic and simple manner.

Within the context of the communications strategy, an engagement plan has also been developed. The plan focusses on the period leading up to the release of the Forum's strategy in or around October 2016. It sets out an integrated set of communications and engagement activities that build the profile of the Forum in a manner that is safe, builds realistic expectation, minimises any potential reputational risk and is efficient and SMART.

Using a timeline of events and meetings as a starting point, activities are conducted focussing efforts around three key Forum milestones:

1. **Agreeing and undertaking the Forum's Programme of Work:** October 2015 – June 2016;
2. **The Draft Strategy:** July 2016 – September 2016; and
3. **The Final Strategy:** October 2016.

Key focus areas include engagement with the Payments Community, the development of a dedicated Forum website, an engagement plan for the chair, participation in various events and conferences and a media plan.

Due to the importance of engagement with the Payments Community, particular emphasis is placed on activities that ensure the Community's constant and meaningful engagement.

This plan is continuously updated and is detailed in [annex 1](#).

Payments Community Engagement

Following on from the Payments Community engagement strategy presented to the Forum at the last meeting and subsequently confirmed, the Forum Secretariat have initiated the engagement plan which is designed to both grow and engage the existing community through the following actions:

¹ See Annex 1: Forum Communication Strategy at a Glance

- Roundtables for each individual affinity group have now been scheduled and communicated for w/c 25th January 2016
- The Forum Secretariat has met with various umbrella organisations to discuss ways to engage with their membership. These organisations have agreed to work with the Secretariat to grow the Payments Community in the following ways:
 - Draft communications to send to their membership
 - Presentations to key internal groups with an interest in the work of the Forum
 - Presentations at conferences and events
- The secretariat has continued bilateral meetings with interested organisations

A full update on these activities is provided in [annex 2](#).

Action: Forum to **note** this update

A Collaborative Effort

The Forum Secretariat will proactively identify opportunities for engagement and profiling of the Forum.

There is also significant potential for the Forum to benefit from opportunities presented to Forum members where information on the Forum may be shared. These include instances where Forum members are invited to speak at key national and international events, panel discussions, participation in events, workshops, interviews, briefings and others. Forum members are encouraged to make contact with the Secretariat to discuss such opportunities.

In all of the activities identified, the Forum chair will be the main communication champion for the Forum.

The chair will be supported by the Working Group chairs, Forum members (as appropriate) and the Forum Secretariat in communication and outreach activities.

Action: Forum members are **requested to support** the communications and engagement plan and to **advise** the Secretariat of opportunities (e.g. conferences, events, interviews, etc.) where they could share information on the Forum.

Annex 1: Forum Communications Activities at a Glance

Forum meetings

The agenda for Forum meetings form the bedrock of communications and outreach for the Forum. In the spirit of transparency, all documents distributed to Forum members will also be made freely available online. A Forum website will be developed that will serve as rolling record of the Forum's development, as well as an open online document repository.

Engagement plan for the chair

An engagement plan for the chair has been developed in order to put in place a strategically coordinated, integrated and sustainable plan that would inform the Chair's engagement efforts on a continuous basis.

The plan includes managing and advising on meeting requests, media, speaker requests, event attendance and strategic outreach efforts, amongst others.

Targeted outreach

Strategic and targeted outreach with key decision-makers and groups will be undertaken, including:

1. Internal outreach (to the PSR; FCA/BoE/PRA; etc.); and
2. External outreach (to supply-side CEOs; Demand Side Executive Directors) and political outreach to Westminster, relevant government institutions, the European Commission/EU and others.

Events

The Forum team will identify selected national and international events to build the profile of the Forum.

Media

The Forum team will engage with media in both a proactive and reactive manner.

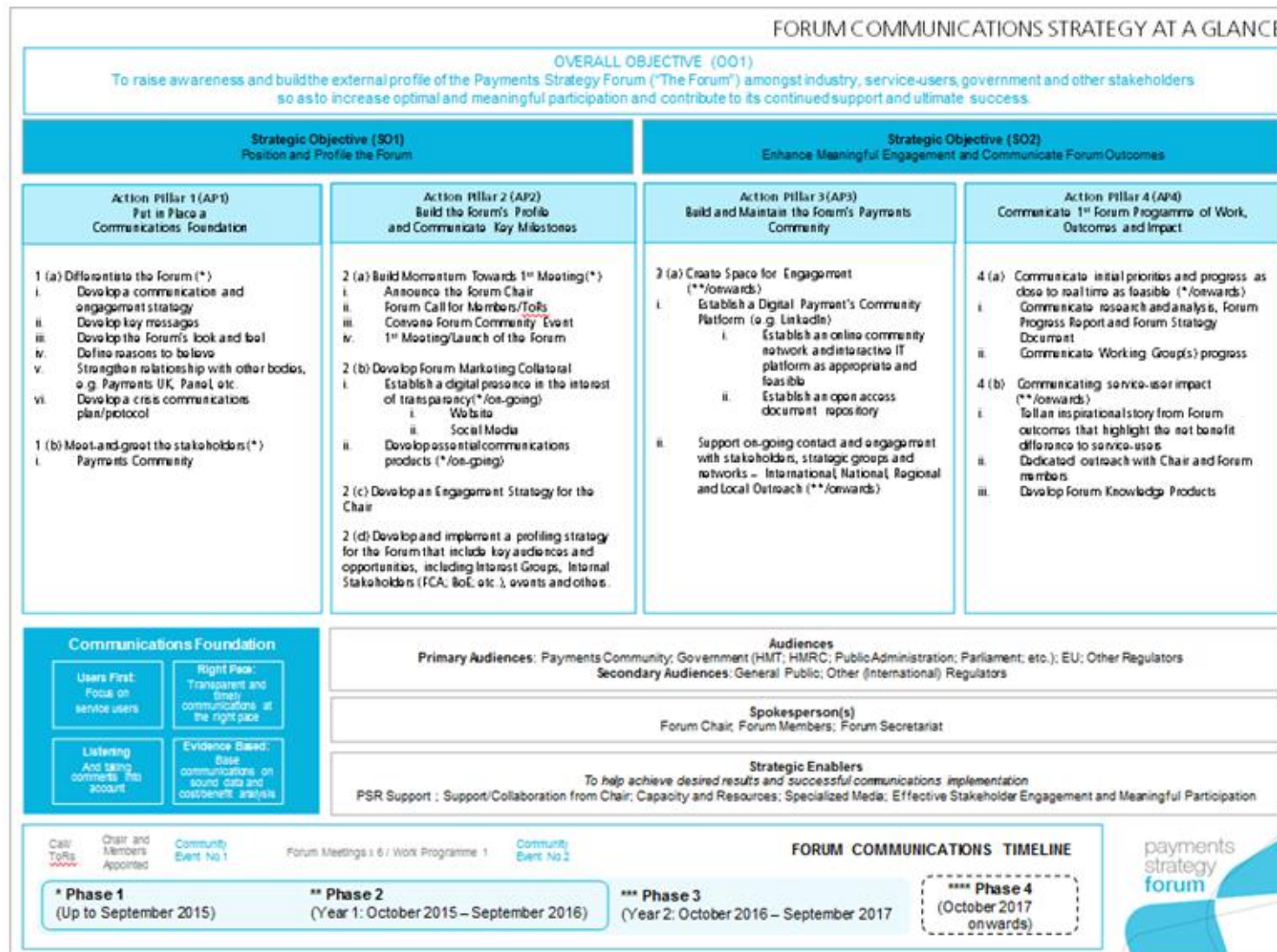
Proactive relationship management of the media will be done strategically in a staggered approach.

Contact with carefully selected journalists/media platforms will be made pro-actively in Q4/2015 and Q1/2016. The objective of outreach to media will be to:

1. Establish a collaborative working relationship with media to support the external profile of the Forum; and
2. Build an informed journalist college from trade press and magazines that the Forum team can draw on when required.

A low level of media presence will be built up throughout 2016, leading to the release of the Final Strategy and featuring prominently in a reputable publication with wide reach amongst decision-makers and the general public.

Reactive engagement with the media will be conducted on an *ad hoc* basis if and when required to do so.



Annex 2: Engagement with the Payments Community

The PSR intends to engage and grow the existing Payments Community which currently has 300 members.

In accordance with the engagement strategy approved after the last Forum meeting, the Payments Community have been split into five categories for targeted engagement.

Small Users – Large Users – PSPs – Suppliers and Providers – Experts

Roundtables for each group have now been scheduled and communicated for w/c 25 January 2016.

In addition to activities designed to engage the current Community, the PSR have met with the following umbrella organisations to discuss ways to engage with their membership:

- The British Bankers Association
- Payments UK
- The Confederation of British Industry
- The British Retail Consortium
- Vendorcom
- Innovate Finance
- The Emerging Payment Association
- The Federation of Small Businesses

The reception has been positive and the PSR has offered the following engagement with these groups:

- Draft communications to send to their membership
- Presentations to key internal groups with an interest in the work of the Forum
- Presentations at conferences and events
- Dinner between the Chairs and C-level membership

The secretariat has met bilaterally with the following organisations who wish to join the Community:

- Epiphyte – Concerned about the lack of digital currency representation on the Forum
- 2 Checkout – Concerned with access to safeguarded bank accounts