

## **Lancashire Local Pension Board**

Meeting to be held on Tuesday, 30 April 2019

Electoral Division affected: None;
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### **Report of the Advisory Group on the Service Improvement Plan**

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#### **Executive Summary**

Feedback from the Advisory Group established by the Board to work with the Deputy Director of Member Operations at the Local Pensions Partnership on the implementation of the Service Improvement Plan.

#### **Recommendation**

The Board is asked to comment on the feedback from the Advisory Group as set out in the report.

#### **Background and Advice**

The Deputy Director of Member Operations from the Local Pensions Partnership attended the Pension Board on the 29<sup>th</sup> January 2019 to discuss the performance of the pension administration service.

Following an open and positive discussion about a number of planned improvements intended to both assist with the stabilisation of the service over the next 12 months and develop future service provision, the Board agreed to establish a small Advisory Group to meet with the Deputy Director and discuss the proposals further from a user's perspective.

Arrangements were subsequently made for a one off meeting of the Advisory Group (comprising Mr S Thompson and Miss Y Moulton, accompanied by Mr C Smith, Technical Adviser Pensions) with the Deputy Director on the 6<sup>th</sup> March 2019.

At the meeting the Deputy Director discussed in more detail proposals included in the service improvement plan (some of which were still in the initial stages of development and had yet to be agreed internally) and members of the Advisory Group had an opportunity to give her the benefit of their knowledge and experience of the administration service from a user's perspective.

Feedback from the Advisory Group on various items discussed is set out below for consideration by the Board.

## **Contact Centre**

1. Call waiting times had been reduced to between 1 and 1½ minutes and it was acknowledged that in view of the volume of calls received this was most likely to be a minimum period which could be achieved. It was suggested that the 10 minute cut off for call waiting should be treated as a priority.
2. In future employers calling on behalf of a member should be given the option to have their call directed to a dedicated Team in the Contact Centre as this would also improve call handling. A specific mailbox for employers would also be beneficial as it would separate employer emails from those in the single shared inbox.
3. In future calls to the Contact Centre should be monitored in order to identify specific trends or issues from employers so that they can be referred to the Engagement Team who can use the data to target and address any identified issues.
4. Whilst callers were waiting there was an opportunity to provide them with automated messages about the services available through My Pension Online and this should be explored.
5. Consideration should be given to including a facility on My Pension Online where files or template documents could be available for use or information could be uploaded, removing the need for emails or posting documents which would be both more efficient and better in terms of GDPR.
6. An effort should be made to retain experienced staff in the Contact Centre rather than having the Centre viewed as an entry point into the local Pensions Partnership where staff would gain experience before moving on to positions elsewhere in the organisation.

## **Communications**

1. Current standard letters should be reviewed and where necessary amended to make them clearer and more user friendly.
2. Consideration should be given to the length of time that a case is left open. Provided sufficient monitoring is in place and that the member concerned is informed the majority of cases should not remain open for longer than 12 months without any progress.
3. Smaller employers may require additional support with regard to keeping up to date on policy/processes and may benefit from bulletins or events specific to them.
4. Providing individuals with clear information about processes for things like retirement, including realistic timescales, would help minimise queries and help manage expectations.

5. Through newsletters and planned visits employers should be encouraged to check information held by them on the EPIC system and where necessary amend/update it.
6. Similarly the Engagement Team should review contact information which it holds.

### **Internal Processes**

1. Both members and employers should be encouraged to register for the My Pension Online facility.
2. It would benefit members if, when running an estimate on My Pension Online that it included a clear explanation of the rationale behind the pre populated figures, for example: why one figure is up to 31<sup>st</sup> march whilst another is rounded up to the end of the last month.
3. Members and employers should be given an opportunity to provide feedback on the service they have received in order to identify any issues and inform future improvements.
4. The Key Performance Indicators in the Service Level Agreement between the Fund and the Local Pensions Partnership should be reviewed in order to ensure that they give a realistic reflection of the member experience.

### **Consultations**

The Deputy Director of Member Operations at the Local Pension Partnership

### **Implications:**

This item has the following implications, as indicated:

### **Risk management**

The aim of the Advisory Group is to provide the Deputy Director with an opportunity to discuss proposed improvements to the pension administration service with members of the Pension Board and get the benefit of their insight and experience as users of the service.

### **Local Government (Access to Information) Act 1985 List of Background Papers**

Paper	Date	Contact/Tel
NA		
Reason for inclusion in Part II, if appropriate		
N/A		