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## Staff Performance and Training

To assist in the reduction of the backlog work and to remove the ongoing contribution to it, work is being done with team members to monitor and improve productivity levels. This work is being driven by the Operations managers and is an ongoing effort to enhance the performance of the department. To assist the Ops managers with the monitoring of daily activity and incoming workload a performance dashboard is being developed using the Tableau software. This dashboard will provide the ability to plan daily and weekly workloads for individuals as well as monitor certain cases and tasks giving us better visibility of key KPI measures so we can proactively monitor them and therefore increase performance. Alongside the performance management team members are being upskilled in different processes to broaden skill sets and increase resources available for certain activities. This work is being linked to the volumes within the department so that we have a larger team able to deal with higher volume tasks. This activity will be managed through the development of a departmental skills matrix which will highlight gaps in knowledge of the team members and will also link to the teams appraisals and 121s. Spreading skills and knowledge throughout the team will enable greater management of workload volumes as well as provide resilience in areas of specialism whilst aiding the succession planning for the department.

## Department Restructure

**Jan 18 update – The consultation period for the management restructure closed on 30 November and we await approval from the relevant scrutiny review group to implement the planned changes. This is expected by 20 January. The proposal centres on the replacement of two existing management posts (Operations Manager and Process Owner) with two new management posts (Service Delivery Manager and Support and Development Manager) whose primary focus will be respectively on KPI performance and efficiency improvements through application of technology. These are likely to be external appointments and hope to have these new posts filled during Q1 of the 2018/19 financial year. The current Operations Manager and Process Owner are expected to leave the team by the end of April 2018.**

## TUO and Teachers MDC

As part of our process improvements we have signed up to use two online systems that will help automate elements of existing processes therefore contributing to reduction in the teams workloads and assist in improving the service delivered around these processes. The teachers Monthly Data Collection is now live and in it's final stages where we are working with other teams within the service as well as the schools to correct the data cleansing issues. Once the outstanding errors are rectified this monthly return process will minimise the effort required from within Pension services around this process and remove the lengthy annual return process which it replaces. Tell us once will be kicked off in Oct with one of our London borough customers who have agreed to the terms and are happy for us to use it on their behalf. Once they are on-board we will follow with the rest of the funds over the next couple of months. The use of the system will speed up the notification of member deaths therefore speeding up the initiation of the processing of their cases and contributing to our KPI performance.

## Altair Quick Wins and Process Improvements

Off the back of a review session held with colleagues from Heywoods to look at how we are using the Altair system and where we can quickly improve the day to day transactions. We have agreed to host training sessions for the team members which will address some of the improvements which were outlined in the post session report. This training will re-educate the team in certain functions of the Altair system and look at some basic workflow redesign to help improve task processing. Following on from the implementation of quick win improvements we have agreed with Heywoods to look at a complete redesign of our retirement process. The investigation and redesign will deliver a two stage improvement plan. An immediate to-be process which we can implement straight away as well as a future state process which will require other factors being in place to achieve. This exercise is also being treated as a pilot for the service from Heywoods and if successful we will look to use the same approach with all of our key processes. Working with Heywoods in this way will make sure we are making the best of the technology we have and also enable us to contribute the development of new functions and features of the Altair system giving, further improving how we will work in the future.

**Jan 18 update – Following the review of existing workflow processes outlined above, some significant changes have been made from January 2018 to both the workflow processes and the allocation of casework by team leaders for the subjects of 'retirements' and 'deaths'. We anticipate that this will have a positive impact on performance in these areas for Q4. The existing process flows and work allocations for be reviewed for 'transfers' during Q4 to implement from Q1 of 2018/19.**

The upgraded version of the member portal has been developed and UAT tested. It is currently with our IMT department who are carrying out load testing to ensure the hosted setup we have with Heywoods is able to handle our user volumes. The load testing will be carried out throughout Oct and the switchover will follow this. Once live on the new version we will continue to develop the portal to make it as user friendly and beneficial for the members as possible.

**Jan 18 update – All supplementary Benefit Statements for 2017 were issued by 30 November. Further communications are to be issued to scheme members between January and March 2018 on a targeted basis to encourage sign-up to the online portal in advance of the 2018 statements being issued. The upgrade to the portal (to provide improved user accessibility) is also now scheduled to go live in Q4.**

### **Altair Payroll Mobilisation**

The move of the pensions payroll to the Altair system will give us control of our complete end to end process and remove the reliance on the SAP system and payroll teams. The project is currently in the final stages of testing and data conversion with the first live payment from the Altair system at the end of Oct. After which the project will continue to deliver the upgrade to the Java version of the system and ensure all secondary processes are working. The project will also deliver a GL report to automatically integrate into the SAP system so that the Finance team can reconcile payments. Training for the team members on the new module is planned for early Oct to ensure the team are able to carry out the necessary input for the parallel running and ongoing use of the system. A lot of time has been spent making sure that all the data is correct within the new system to ensure the payroll runs correctly once in the Altair system.

**Jan 18 update – The migration of the pensions payroll from SAP to Altair was successfully completed in November and all 20,000 plus pensioners were paid correctly without interruption to the monthly payment cycle. As well as providing cost savings to the pension fund in the longer term (once the initial implementation costs have been recovered) this also means pensioners can now view their payslip and P60 information online as well as make changes to their address and bank details.**

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### **i-Connect**

i-Connect will provide a secure way for employers to submit changes to payroll data which will then be automatically updated within Altair on a monthly basis. This again will improve the service and process for our employers as well as provide efficiencies internally with the reduction of record maintenance and end of year activities. We have agreed a 3 month pilot of the i-Connect system with Heywoods so that we can establish how it would benefit us and if it can realistically work for us and our employers. There is keen interest in this from our London Borough customers we are looking to use a Hillingdon employer as part of the pilot. We have planned to mostly test the system internally with SCC so that we can review how the system works both from an administrator and employers point of view. We have developed the report required and have requested all the necessary IMT resources for the implementation. At present we are working with the Information Governance team to ensure the system meets all our data requirements as personal data will be travelling outside of our network. This process has been lengthy and once approved we can kick off activities to set up the pilot.

### **Scanning and Bar Coding**

The existing setup for the scanning of documentation is far from robust and is outdated. With the upgrade of PC hardware across the County the existing scanners are now unsupported in the IMT infrastructure. With the aim to reduce paper within the department replacing the scanners would not be cost effective and would be replacing old technology. We are currently in investigation with our IMT colleagues to understand options for utilising existing MFD machines for the scanning of documentation whilst retaining all the indexing capabilities we currently have. Alongside the replacement of the scanners we are looking at the bar coding facilities within Altair. This will give us the ability to automatically indexing documents generated from the Altair system which will automate a large chunk of the daily postal processing enabling team members to utilise the time on other more value adding activities. These activities are due to be kicked off in Oct with the new processes live by the end of the year.

### **Data Screening**

To improve our data quality and our communication with members and pensioners we are working with a company to cleanse our database and provide address

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