



The Surrey Local Pension Board 17 January 2019

Administration Update 1 October 2018 to 31 December 2018

Recommendations:

The Board is asked to **note** the content of this report and make recommendations if any further action is required.

Background

1. The Board has previously requested to be kept updated on progress relating to a number of key administration projects and planned improvements which may have an impact on members of the pension fund and the purpose of this report is to provide an update on the current status and progress against any specific target dates.

Administration Team Update

2. All nine of the additional staff recruited have now joined the team and are in the process of being inducted.
3. Standardised Induction Packs have been created and are in use for the new staff.
4. Personal Development Plan (PDP) templates have been created and will be shared with all staff on a grade by grade basis.
5. Roles and responsibilities have been defined for each grade and details will be shared with staff at the same time as rolling out the new PDP.
6. A new team structure is being finalised which will improve the effectiveness and efficiency of the team. This will require additional training which will be picked up as part of the Development Plans.
7. Due to ongoing major service transformations within the Council, additional agency staff have been recruited so as to avoid impact on BAU.
8. The Heywood's Training and Education Centre is now live, with Surrey being the first authority to start using this.

Customer Complaints Report

9. Complaints received for this quarter have reduced slightly in comparison to the second quarter of 2018/2019, with a total of 13 received. This is still significantly low in relation to the number of cases processed during the period. Initial acknowledgement of all 13 complaints have been carried out within the turnaround time of 5 working days.
10. It is noted that Lack of Communication and Service Delay have been the highest subject of complaints received with 30.77% and 46.15% respectively. It is also noted that four complaints are still to be resolved and are therefore outstanding. The team have ensured that any customers with complaints that cannot be answered within the turnaround time of 10 working days are contacted regularly to keep them informed of the delay.
11. It is to be noted that the department is going through a significant period of change, with processes being investigated to improve the customer service provided. This has meant that resource has been limited at times throughout the department.
12. The lead officer will be analysing complaints to understand where lessons can be learned and any process improvements made where appropriate.

Projects

13. The current backlog has been quantified and discussions are underway as to how to resource the clearance of this work.
14. i-Connect is currently being tested to ensure it is fit for purpose. If funding agreement is reached the aim would be to start on boarding employers from April 2019.
15. The GMP Reconciliation is progressing and currently on track.
16. A Project Manager and Project Support have been recruited to assist with the numerous ongoing service improvement projects.
17. Data Cleansing has started with data being extracted from Altair and loaded to the Hyman's portal in order to ascertain the number of data errors. These will be reviewed in conjunction with the Common/Scheme Specific Data errors and the Club Vita data errors.

Process Improvements

18. A revised New Starter process is being piloted with the District and Borough Councils which allows for the electronic submission and upload of data in order to streamline the process.
19. As part of the revised new starter process an improvement to the initial transfer process is being trialled which pushes the onus on to members to initiate and track their transfer of previous pension benefits.
20. A new electronic Leaver Form has been developed which will allow for the submission and upload of data. Again streamlining the process. The pilot for this will be carried out shortly with the District and Borough Councils.

Self Service Review

21. During the course of 2019 we will be looking to make more use of the website and self-service portal to introduce more options to our customers.
22. Taking this approach will enable the most straight forward transactions and enquiries to become self-service transactions leaving our teams to deal with the more complex “moments of truth” transactions such as deaths and retirements.
23. This will allow us to spend more time on the important matters for scheme members.

Next steps

24. The Board are asked to note the updates and agree on the form of any future updates that are required.

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Sources/background papers:

Annexes:

1. 2018/19 Customer complaints Q3

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