



**Pension Administration
Service Improvement Plan 2 (SIP2)
Workshop update 4th September 2019**



Vision

The outstanding provider of exceptional LGPS Administration

Mission

Excellent service from expert people and an engaging self-service which our members and client partners value.

Vision Goals

- ✓ Improve customer satisfaction with engaging self service and helpful pensions experts
- ✓ Efficiency of service to drive response times and cost effectiveness
- ✓ Scalable service for growth

Service Improvement Plan

Four pillars underpinning the Strategy:

- ✓ Data Improvement – accuracy
- ✓ System Improvement - efficiency
- ✓ Process Improvement - effectiveness
- ✓ People Improvement - performance

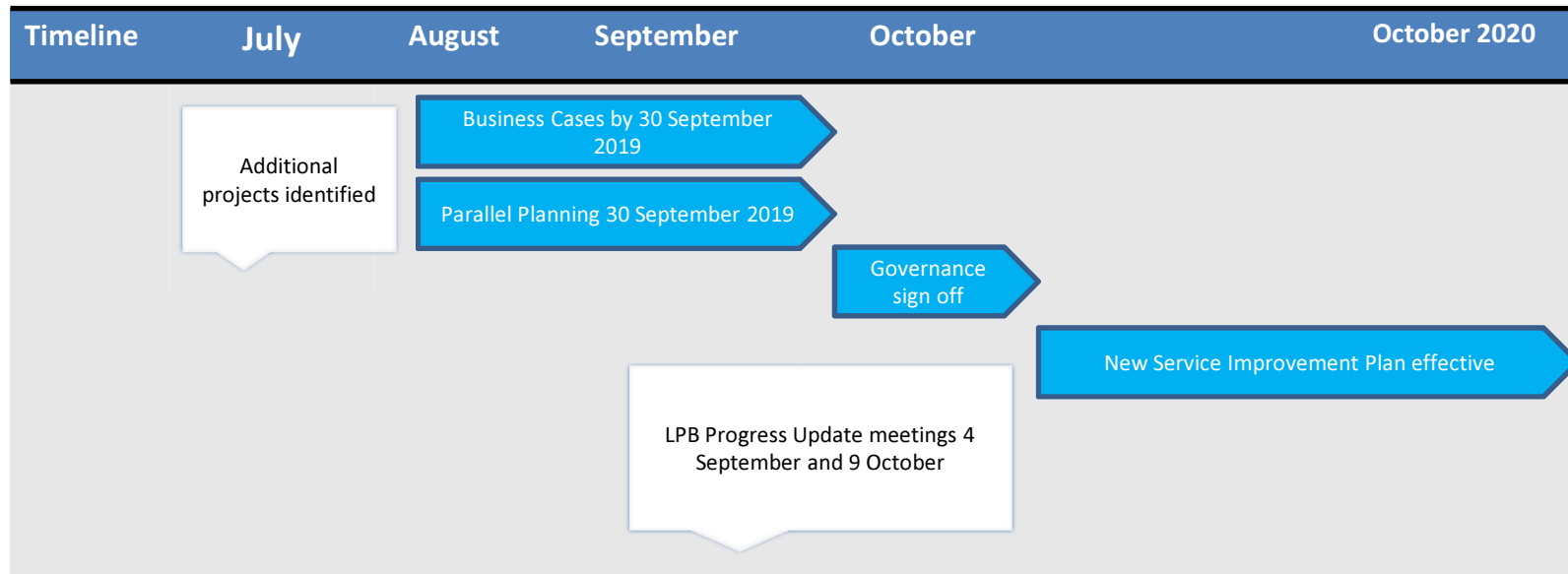
Delivered in three stages:

1. Stabilise – lead, support, plan, correct, deliver, control
2. Enhance – protect, prevent, improve
3. Optimise – value, engagement, scale

Current Service Improvement Plan									
Project	Q1 19	Q2 19	Q3 19	Q4 19	Q1 20	Q2 20	Q3 20	Q4 20	Planned Completion
Backlog stage 1	Supplier Appointed	First 5,000 cases QA	Next 5,000 QA	Remaining 10,000 QA					30 September 2020
BAU Stabilisation	Stabilisation of BAU								30 June 2019
Major Scheme Events	EoY; Valuation; ABS								31 August 2019
Internal Audit Actions	Actions on Findings	Audit	Final Actions completed						31 March 2020
GMP Reconciliation	GMP Reconciliation		Fund Decisions and Rectification						31 March 2020
System Improvement	Iconnect roll out, Immediate Payments, Pensions Admin/Payroll interface								30 June 2020
Process and Procedure Improvement	Process and Procedure improvements								Continuous Improvement

3 Additional Projects identified 17 July 2019:

1. Backlog stage 2
2. Service Resilience
3. KPI Reporting



It is recommended that the Pension Fund Committee:

Approves the following governance steps in order to expedite progress of the administration service improvement plan and provide appropriate assurance:

Pension Administration Officers to provide cost estimates to Pension Fund Officers for each project in the Service Improvement Plan Stage 2 (SIP2).

Fund Officers set out and agree with Pensions Administration Officers the appropriate assurances in support of the projects in the SIP2.

The Business Case for the SIP2 is written and agreed by the Pension Administration Officers and Fund Officers.

Authorisation of the Business Case to be delegated to officers (including the Director of Corporate Finance) in consultation with the Chairman of the Pension Fund Committee and the Chairman of the Local Pension Board.

Service Improvement Plan Progress

- ✓ Backlog clearance progressing
 - ✓ 5,355 sent, 3,785 completed by 30th August
- ✓ End of Year completed 16th August
- ✓ Valuation data completed 19th July
- ✓ Annual Benefit Statements delivered by 30th August
 - ✓ Actives 31,416, Deferreds 19,723 (14,097 gone aways)
- ✓ GMP 97% matched 91,927 records
- ✓ Payroll to Pensions Interface now live – a game changer
- ✓ 3 Robots processing
- ✓ SIP2 detailed planning has started – due 30th September

Service Improvement Plan Progress

- ✓ Governance process proposed
- ✓ KPI Reporting in development – due for October LPB
- ✓ SIP2 business cases and detailed planning has started – due 30th September

