

North Yorkshire County Council**Pension Board****12 October 2017****Pension Board Projects****Administration Report****1.0 Purpose of the Report**

1.1 Pension Board members agreed to come to the October board meeting prepared to initiate the projects below:

1.2 When agreeing to initiate these projects Pension Board members are asked to be mindful of officers' time and resource, which is already under pressure due to the high work volumes being experienced, when defining the scope and timing of the projects identified.

2.0 Projects Identified**2.1 Exercise of employer and administering authority discretion**

Some initial work has been done to revisit the existing list of discretions as some errors have been identified. Further progress has been impacted by regulatory and compliance checks of the Annual Benefit Statements and the requirement to issue Pension Savings Statements by 6 October. As soon as the additional work arising from these two activities has subsided work will re-recommence on the discretions policy review.

2.2 Management, administration and governance process and procedure

It is unclear what this project encompasses and officers request clarification regarding the scope, scale and timescales involved. We believe, as it stands, this heading is too broad and Members are asked to clearly define the work-streams included.

2.3 Development of improved customer services

A review of current practices and processes has been undertaken and a roadmap of improvement initiatives has been created. This has been shared with the whole pensions' team and a short version of this will be presented to the Pension Board Members. A copy of the presentation is attached at Appendix 1.

2.4 Scheme member and employer communications

A letters review project has commenced where every member letter produced will be reviewed for content, plain English and suitability. Employer communications are undertaken as and when required. It is difficult to be pro-active with our communications at this time due to the high work volumes being experienced within the pensions' team.

3.0 Recommendation

3.1 Pension Board Members are asked to agree who will lead on each project.

3.2 Pension Board Members are asked to agree on the timing of each project.

3.3 Pension Board Members are asked to understand that the pensions' team is currently experiencing high volumes of work and therefore it is difficult to take on board additional activities at this time.

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Background Papers - Nil



North Yorkshire Pension Fund

Our Vision

- To deliver the best possible outcomes for our members utilising all the tools at our disposal.
- Standardise, simplify and share working practices and resources with a focus on delivering better customer outcomes and reducing costs.

Our Mission Statement

“To deliver the best possible service in
the most effective way”

What does this look like?

- Reduced turnaround times
- Reduced errors and reworks
- Reduced backlogs
- Reduced complaints
- Better working environment
- More fun!

How?

1. Improve processes
2. Utilise technology to its fullest
3. Improve efficiency
4. Free up time for project work
5. Deliver service excellence

How?

1. Improve processes
 - Many processes are cumbersome and time consuming
 - Too many processes require too much manual intervention
 - Empower and encourage the team to suggest changes
 - Educate 3rd parties

How?

2. Utilise technology to its fullest
 - Make the systems we have work correctly
 - Harness the capabilities of all the relevant systems to their fullest
 - Develop automated data feeds in and out
 - Ensure system updates do not impact existing functionality

How?

- 3. Improve efficiency
 - Comes from process and system improvements
 - Encourage and empower the team to ask Why?
 - Review team structures
 - Educate 3rd parties

How?

- 4. Free up time for project work
 - We need to free up time to undertake the projects that will deliver improvements
 - Short term pain, long term gain
 - Gets easier as things improve
 - Easier to resource future projects

How?

5. Deliver Service Excellence
 - Right first time
 - In a timely manner
 - Knowledgeable staff
 - More time to deal with members enquiries

When?

- Roadmap created & available to view
- Key projects identified & scheduled
- Will take time, still have BAU demand

Questions

