



Administration Service Improvement Plan update Q2 2023



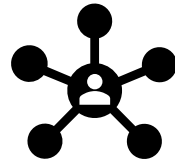
Key levers to improve people environment - Update



- Improve salaries – Done



- Fill vacant positions - Started



- Leadership & communication – Ongoing



- Organisation, Training, Development, and Career Progressions – Ongoing

Payroll ...

Q2 UPDATE

- New team leader resigned
- Resourced with 3 full time officers (2 seconded) and 2 casual officers
- BAU working well
- Resilience & confidence in ability to maintain payroll services

OBJECTIVES

- Fully resourced
- Robust processes
- MI on workflow – full transparency



ACTIONS

- Review structure of payroll team
- Maintain support from Members Services officers
- Work on backlogs
- New process for Mortality screening
- New policy & processes for overpayments
- Create workflow to manage work - January 24
- Workflow reporting - March 24

Leaver process

Q2 UPDATE

- Leaver team in position
- Training rolled out to removed duplication of checking
- Agile review of officer resource to support business needs

OBJECTIVES

- No backlogs > 60 days
- Meet TPR & regulatory requirements
- Meet SLA targets set in Admin Strategy (CIPFA) agreed by Pensions Committee
- Employers providing timely & accurate data



ACTIONS

- Development of bulk digital processing underway
- Streamline & digitalise 3 key processes
 - Leaver
 - Starter
 - Post changes
- Support & Development
 - Employer training ongoing
 - People training & upskilling ongoing

Management Information (MI)

Q2 UPDATE

- New reports giving better oversight
- MI being used to make weekly decisions with officer resource
- New report on individual employer performance

OBJECTIVES

- Transparency of work levels
- Reporting to support pro-active achievement of KPIs and SLAs
- Agile reporting, weekly, monthly
- Employer performance
- Team productivity

ACTIONS

- Ongoing review & development of weekly MI reports
- Review of workflows to in-bed new reporting with new processes and responsibilities
- Create, design, test and deliver new reports

Day-to-day and backlogs....

Q2 UPDATE

- Increase in outstanding cases due to increase in incoming cases
- PI error cases c.1000 cases
- Operations Manager involved in weekly decisions
- Cases held due to SCAPE rate now workable
- Task force created to deal with increase in email traffic due to ABS campaign

OBJECTIVES

- Fully resourced & trained team
- No backlogs > 60 days
- Self service & digital processes for members & employers
- Satisfied members
- Engaged workforce



ACTIONS

- Weekly cross team meetings to discuss workloads & support
- Operational focus on 2 key areas
 - Retirements
 - Death
- Review options including outsourcing of PI error cases

Service Improvement Plan – project update

Change Programme Administration			
Key Objectives	Current Phase of project	Completion Date of overall project	Status

Annual Projects

Year End	YE complete but review and fine assessment still to be done	Jun-23	Complete
Annual Benefit Statement	All active and deferred statements published	Aug-23	Complete
Annual Allowance / Pension Savings	Calculate allowances & review exceptions	Oct-23	In progress
Annual Report	Collation & proof reading	Dec-23	In progress

Regulatory/Foundation

GMP – remedy & equalisation	Category B members review	May-23	In progress behind schedule
MI & Insights on service levels	User Test & Sign-off	Aug-23	Complete
Employer number series	Testing and communications	Nov-23	In progress
McCloud (Fire)	Legislation published / Pre-legislation Category 1 remedy	Jan-24	In progress
Fire Exit	Initial Planning with WYPF	Jan-24	In progress
Pensions Dashboard	Preparation of data, comms, governance, DAP Admin	Mar-25	In progress
McCloud (LGPS)	Legislation published / Heywood UAT	Sep-25	In progress

Transformation

Website – employers	Content review, update and upload	Nov-23	On hold
Website – members	Content review, update and upload	Nov-23	In progress behind schedule
Rebrand	Delivery of remaining design assets	Nov-23	In progress
Leaver process - phase 1	New leaver team set up	May-23	Complete
Leaver process - phase 2	Process review - impact and scoping assessment	May-24	In progress
Bulk processing, e.g. refunds	Process review - impact and scoping assessment	May-24	In planning
Organisational structure	Job description preparation	Mar-24	In progress
My Pension Online – upgrade	Scope analysis & recommendation	Mar-25	In progress
New member onboarding	Scope and starter documentation reviewed	Mar-24	In planning