Department of Health & Social Care

NHS Pension Board summary of minutes: 18 May 2023

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Administrator Data and Key Performance Indicator (KPI) Performance

An overview of the KPIs and administrator performance data was provided.

It was reported that seven cases were failed for Child Allowance in January due to administrator error; further training is to be undertaken. Revised Awards are now back within KPI.

Opt Outs - there was a spike in the number of Opt Outs in October 2022, which coincided with the contributions change.

Quality Assurance – KPI was exceeded throughout the quarter.

Complaints and Internal Disputes Resolution (IDRs) – the number of complaints and disputes was 179 in the quarter, 103 were upheld and 243 were cleared, the main reasons being: Process/Procedure incorrect and System/Website availability.

IDR1s – 293 were received, 185 upheld and 384 cleared. JM noted that the categories need more refinement.

IDR2s – 80 were received, 24 upheld and 60 cleared.

Pension Ombudsman cases – there was one case partly upheld where the member did not agree with the Adjudicator's decision, but PO upheld the decision.

Breaches of Law – there were no Breaches of Law.

Business Improvement Initiatives

A presentation was provided of the Business Improvement Initiatives, noting that:

In a recent Government review it was noted that NHS Pensions 'compares less well (to other Pension providers) in terms of the customer offer' and 'there is scope… to improve efficiency and performance… by getting closer to the best performers in terms of customer experience'.

The Customer Feedback and Improvement Team (CFIT) will address these observations:

- Full focus on delivering customer service needs through a managed process of capturing, analysing and acting on feedback from multiple sources.

- Improved decision making with all feedback gathered and contained in one area – allowing for consistency and control from receipt to action.

- Support a culture change to deliver improved levels of service across NHS Pensions raising the customer profile and putting customer service at the heart of all we do.

- Ultimately drive an improved service for our customers leading to reduced levels of complaints and improved Customer Satisfaction scores.

- The team is putting the customer at the heart of everything they do, CFIT will manage the end-to-end process of receiving and acting on all sources of Pensions' customer feedback with all feedback from across the business coming into this one place.

Compliance Report

There have been recommendations implemented in:

- ARER Awards

- Ill Health Retirement

- 1995 Age Awards – special retirement provisions

- Pensions Online (POL) Products

Planned reviews are:

- Death on Pension

- Partial Retirement (drawdown)

Member Communications

Details were shared re internal BSA communication activities:

- Member research - re ESR opt outs – to ask more in-depth questions about drivers, they are looking at findings with the outcome being more targeted messages; and possibly contacting members before auto-enrolment.

- Member contributions communication – call volumes remain low following a successful disclosure exercise.

- Retirement flexibilities – a web page was developed showing options for flexible retirement; disclosure letters were distributed, starting prior to the end of consultation, focussed on those coming up to retirement age to June 2023; calls remain low due to the quality of letters.

- Some work has been done on updating resources/web pages. Emails were sent to Employers to point them to the guidance and advising of the plan to communicate regularly with high level communications; advising Employers to speak to employees to get the right conversations going. Changes are being made to the claim communications to make it clearer what needs to be completed for partial retirement.

Update on New Regulations, Guidance or Consultations

Updates were provided on:

- Partial Retirement

- McCloud issues

- Compensation Scheme

- Tax issues

Deep Dive Presentations

The following Deep Dive presentations were provided:

- Update from the Stakeholder Engagement Team - provided by Elizabeth Chapman, Operations Manager, NHS Pensions

- Measuring Customer Experience – provided by Hayley Dorning, Stakeholder Engagement Manager, NHS Pensions

- Cyber Security update – provided by Tony Burgess, NHSBSA Head of Cyber Security and Infrastructure Services and Peter McCann, NHSBSA Information Security & Business Continuity Manager