

Pensions Committee

2.30 p.m., Monday, 24 March 2014

Customer and partner engagement

Item number	5.6
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Executive summary

Customer and partner engagement

Summary

The purpose of this report is to update the Committee on the pension fund's engagement with customers and partners. The following summary aims to provide more detail to the Committee regarding the key performance indicators relating to customers, which are, overall satisfaction, customer service evaluation and complaints.

Overall customer satisfaction

The fund regularly engages with its key stakeholders to assess satisfaction with the service provided and to assess stakeholders' perception of our timeliness, delivery, accessibility, information and quality of customer service.

We engage with pensioners and employers via annual surveys. The employer survey is issued to all employer contacts. The pensioner survey is advertised in a pensioner newsletter and is issued to 500 randomly selected pensioners. The results from these annual surveys are very good. For example, a total of 122 pensioners responded to our 2013 survey and the fund received 67 responses to the 2013 employer survey. 98% of employers who responded were satisfied with staff attitude and professionalism and 89% of pensioners who responded thought staff are polite and courteous. 85% of pensioners who responded agree that the information they are provided with is clear and accurate and 96% of employers who responded are satisfied with the quality of information we provide. The comments received from employers and pensioners are very positive.

The current active and new scheme members are consulted via transactional surveys as responses to our previous annual surveys had been very poor. Changing to transactional surveys has meant that the fund is provided with regular feedback from members who have recently contacted the fund.

In the 9 months to 31 December 2013, a total of 76 active scheme members and 90 new scheme members responded to our transactional survey. 95% of active scheme members agreed that information they were provided with was clear and understandable and 98% who responded agreed that staff were polite and courteous. When new scheme members were asked if the time taken to process their request to join the fund by their employer was satisfactory, 57% thought it was. When new scheme members were asked if they were satisfied with the time taken for the fund to send out their welcome letter only 61% were satisfied.

In addition to our main engagement techniques the fund carries out smaller surveys on particular processes, for example, recently the fund have surveyed a small group of pensioners regarding their satisfaction with the retirement process. A survey is currently being conducted to gain better insight into the perception of our responses to e-mails.

The fund continues to meet overall customer satisfaction target of 86%. The graph below shows customer satisfaction over the last year. It is easier to see from the graph that new members' satisfaction is lagging far behind that of our other stakeholders.



The fund expects the reviewed pensions administration strategy and implementation of the new employer on-line system will help to improve the satisfaction of new members are experiencing by improving our partnership with employers.

Complaints

The fund records all informal and formal complaints as well as the action taken as a result of the complaint. Staff are trained to capture informal complaints made. If a complaint is upheld the fund takes the opportunity to contact the customer and ask them if they were satisfied with the complaints process and if we can improve upon our service. The fund have received very positive comments from those who have been contacted to ask for their feedback and two scheme members who had complaints offered to speak to the CSE assessor to express their satisfaction.

A total of 30 formal complaints and 40 informal complaints (of which 5 were escalated to formal complaints) were received from 1st April to the time of writing. In general these complaints were regarding how regulations have been applied or delays in service.

A total of 60 compliments were received from 1st April to the time of writing. The majority of these related to staff attitude and speed of service.

Complaints and compliments are tabled at team meetings where teams discuss them and learn from the feedback provided.

Customer Service Excellence Award (CSE)

The Lothian Pension Fund has held the CSE award and its predecessor Chartermark since 2005. In order to retain the award the Fund are required to meet five different criteria, customer insight, culture of the organisation, information and access, delivery and timeliness and quality of customer service. Each year an assessment is carried out to ensure that the Fund still meets the requirements and is addressing any areas that have been graded a 'Partial Compliance'.

The annual CSE assessment took place on 3rd February 2014. The fund was successful in retaining the award. The fund will retain the 'Partial Compliance' for our work with our partners, reflecting the issues we have with data transfer from our employers. However, the assessor recognised the good work the Fund is doing to try to address this but it will take time to produce real results for our members. The fund retained a 'Compliance Plus' for the approach to consulting with customers and achieved a new Compliance Plus for commitment to putting the customer at the heart of service delivery.

Over the years CSE has enabled the fund to embed good practice, for example setting service standards, developing good quality surveys, providing guidance on the best way to analyse survey results and act on the feedback. It has also encouraged the fund to constantly review communications and try new customer insight techniques for example customer journey mapping. The award has been a tool and key driver to help improve customer service. However as the fund constantly improves and receives fewer partial compliances, we will look for new challenges to ensure ongoing improvements.

Recommendations

The Committee is recommended to note that the fund continues to meet its overall customer satisfaction target, the retention of the Customer Service Excellence award and the Fund's continued efforts to improve customer service.

Measures of success

Measure of success are retaining the Customer Service Excellence Award and customer satisfaction targets.

Financial impact

There is no financial impact as a result of this report.

Equalities impact

There is no equalities impact as a result of this report. Equalities questions are included in customer surveys.

Sustainability impact

There is no sustainability impact as a result of this report.

Consultation and engagement

The Consultative Panel for the Lothian Pension Funds, comprising employer and member representatives, is integral to the governance of the Funds.

Consultation and engagement with stakeholders is key to achieving the Customer Service Excellence Award.

Background reading / external references

None

Links

Coalition pledges

Council outcomes CO26 – The Council engages with stakeholders and works in partnerships to improve services and deliver agreed objectives.

Single Outcome Agreement

Appendices None