**DfE Overview of Teachers’ Pension Scheme Pension Board Dashboard**

**(as at 31 January 2018)**

**Summary**

Overall, TP provides a good service but DfE is focusing on certain areas of the business in order to seek improvement. DfE rates the performance this quarter as amber. This not green due predominantly to the service customers have been receiving when contacting TP by telephone, the build-up of cases in some areas (particularly in the bereavement area), and issues around the planned move from the RMH(Restricted Managed Hosted) IT environment. It is acknowledged, however, that improvement has been made throughout the period in the area of telephony, and plans are in place to both address the build-up of cases by April 2018 and manage the RMH environment more closely until switchover.

DfE has proactively challenged Capita about our concerns, and we receive daily updates and/or raise at them at the appropriate governance meetings.

**Key Areas**

**Telephony** – This service remains under scrutiny with Anna Alderson and Sue Crane (Contract Managers) working closely with TP on this. However, we are pleased that the contact centre has improved in terms of the overall volume of calls answered, a reduction in the queue waiting times and an improved average answer speed. This is attributed to the increase in staff and other proactive measures taken.

It is acknowledged, in advance, that performance is likely to dip in April, due to what is expected to be very high demand as the scheme/tax year ends. Steps are being taken to manage this, and minimise negative impacts, but there are limits to what can reasonably be done and members may need to be prepared to use alternative channels such as the website – communications are reinforcing this message.

**RMH** – The project to move from the current environment to a modern Cloud environment, Microsoft Azure, is underway. It will deliver better system availability and resilience because the very specialised support required for the current environment will no longer be required. We continue to monitor progress and will challenge where we are concerned about IT Security (through the Security Working Group) and timing of the move (because we do not want summer retirement awards to be affected).

In the meantime, we continue to challenge Capita for continued reassurance that RMH will remain stable. In November 2017, an IT health check was completed which has necessitated some remedial actions which are being monitored via the Security Working Group.

**Bereavements** – Outstanding death benefits cases remains an area of concern for us. There is still a backlog of aged cases, in particular those where there is no ongoing pension to pay but a lump sum might be due to the member’s estate. Sue Crane has continued to challenge and monitor Capita, and is mindful that the Pensions Regulator is aware of the issue and will need to be formally notified if any significant breaches occur.

Work commenced against a recovery plan approved by the department in November 2017, with the end of April 2018 as the target date for completion of the backlog. Progress is being monitored closely through the revised measures, which provide DfE with more granularity about performance against the various types of bereavement cases and give greater focus on the aged cases position.

**Other areas of Concern**

**Capita** - A trading update was issued by Capita PLC on 31 January 2018, triggering a Financial Distress Event. DfE expressed their concerns to Capita about their ability to continue to administer the scheme effectively. We undertook an assessment of their financial standing against contractual/ financial ratios, and Capita were able to demonstrate their ability to maintain the contract. We continue to liaise closely with Capita and Cabinet Office on any developments.

**TP’s ability to service increased volume of scheme members** – DfE have formally acknowledged TP’s request for a contract change but require further evidence on how and why increased member numbers have impacted their ability to delivery key aspects of the service before that can be considered fully. (Issue TP.I.037).

**Correspondence and complaints** – The number of complaints remains higher than DfE would expect – though they are reducing and there has been a marked reduction in the number of complaints regarding the contact centre. As above, plans are in place to address the build-up of cases in the bereavement and correspondence teams which we will continue to work closely with TP on.