Single Public Service Pension Scheme

Induction Session – 11th Sep 2018

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Department of Public
Expenditure and Reform

11th of September 2018	
Welcome and introduction	**10:00-10:15**
Making connections	**10:15-10:45**
Setting the scene	**10:45-11:30**
Coffee Break	
The Lifecycle of a Single Scheme Member	**11:45-13:00**
Lunch	
Working groups and schedule	**13:45-14:10**
Workshop formats	**14:10-14:30**
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Update on related activities	**15:15-15:45**
Wrap Up	**15:45-16:00**

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Everyone to walk away at the end of the day with the same level of knowledge

What

Why

Next Steps

How

Roles

Outcomes

Who

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- Focus on the Future
- Consider both your organisation and your sector
- All perspectives to be considered
- Keep an open mind
- Make new connections

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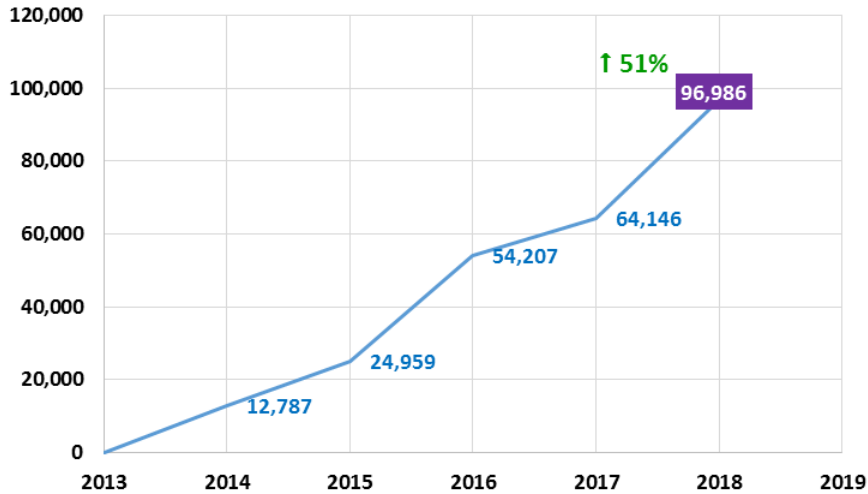| 11th of September 2018	
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Making Connections

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Public Service Member Numbers

Single Scheme - Number of Active Members

Numbers as reported by all Relevant Authorities at 31 Dec 2017

Health:
- HSE > 23k
- Other: avg. 370

Education:
- Department >22k
- Higher Ed. avg. 290
- ETB avg. 400

Local Authorities:
- Avg. 155
- Administration done by MyPay Shared Service

Civil Service:
- Avg. 160
- Administration done by PeoplePoint Shared Service

Agencies:
- Avg. 30

Justice:
- Total ~ 2,300

Defence:
- Total ~2,000

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- Read a box
- Find a person in the room who fits the box (not you or anyone in your organisation!)
- Write their name in the box
- You can only use a person's name once
- Keep going until you've filled all the boxes and can shout…

BINGO !

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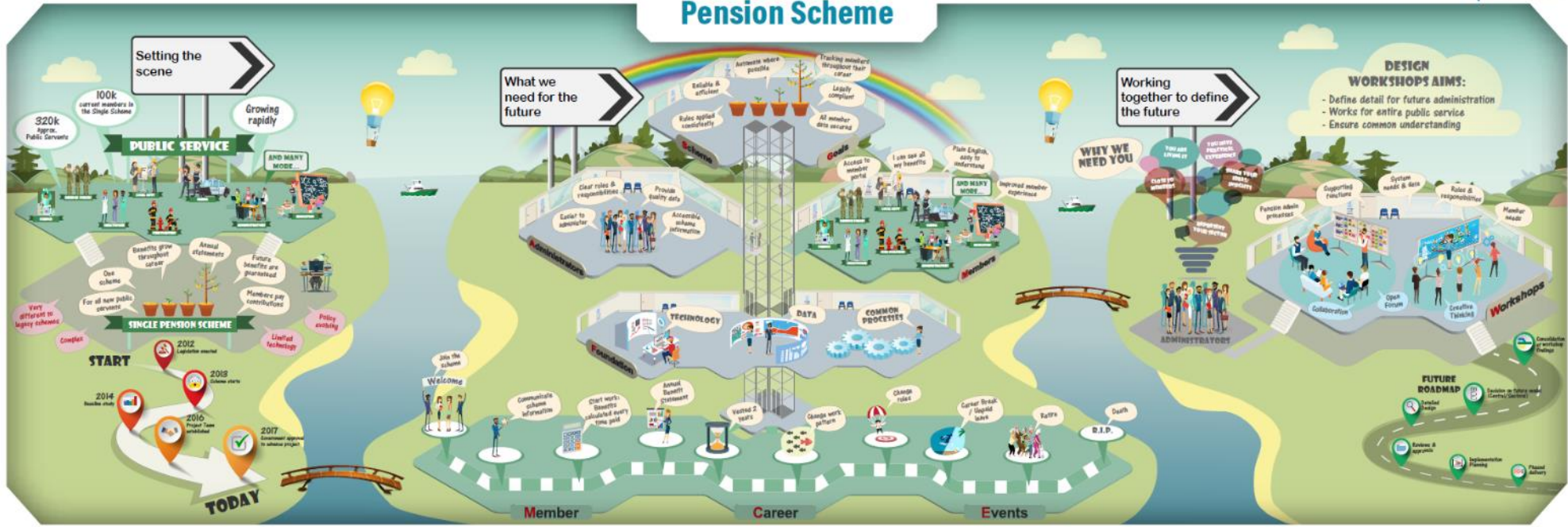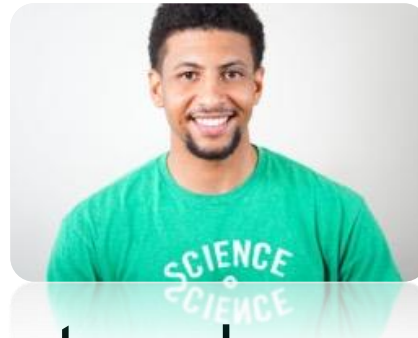| 11th of September 2018	
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Setting the Scene

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Lifecycle of a Single Scheme Member

"A fictional character who represents a typical person who may use a particular service" e.g. Single Scheme Member

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Meet Paul Moore – our Single Scheme 'Persona'

Date of Birth: Jan 1st 1987
Employment Status: Full-time
Civil Status: Married with two children
Employer: Multiple Relevant Authorities during his employment

- Paul began working with his first employer (RA 1) on Oct 1st 2013 when he was **onboarded** as a single scheme member

- He worked with four RAs during his **employment** and took a three year **career break** when he moved to Australia

- Paul took normal **retirement** at 68 and **died** nine years later with his wife being his surviving beneficiary

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- Paul represents the **'Happy Path'** of a Single Scheme member

- His lifecycle is **comparable to many Single Scheme members**

- This allows us to **concentrate on the most common events** which occur as part of his **member career events**

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To help us **understand** steps in a process from **Paul's perspective**

"Walk in their shoes"

To help us recognise that **different people have different needs and expectations**

To help us with **design processes** that **meet the needs of those using the service**

To help us **inform** and 'map out' **Paul's member career events through a user journey**

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Paul's career events help us to **consider the user's experience and needs** at the various interactions ('touchpoints') he has with the different people and organisations involved in the Single Scheme service.

Let's take a look at Paul's single scheme journey
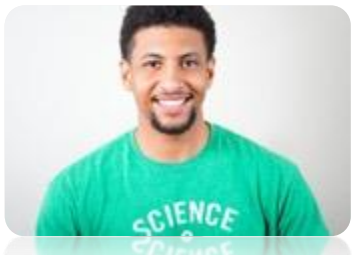
Date of Birth: Jan 1st 1987
Employment Status: Full-time
Employer: Multiple Relevant Authorities during his employment

Onboarding	Employment	Retire	Death

Paul

- Paul joins RA 1 on a full time basis
- Leaves RA 1 following resignation
- Paul joins RA 2 on a full time basis
- Paul returns from his Career Break to RA 2
- Paul moves from RA 2 to RA 3
- Paul moves from RA 3 to RA 4
- Paul retires from RA 4 at age 68
- Paul dies at age 77

Relevant Authorities

- RA 1 conducts local HR onboarding process
- RA 1 receives Paul's letter of resignation
- Is Paul eligible for a refund?
- RA 2 conducts local HR onboarding process
- Payroll and pension payments deactivated
- Payroll and pension payments reactivated
- RA 2 receives Paul's letter of resignation
- RA 3 conducts local HR onboarding process
- RA 3 receives Paul's letter of resignation
- RA 4 conducts local HR onboarding process
- RA 4 presents Paul with his retirement options
- Payments to surviving beneficiary commence

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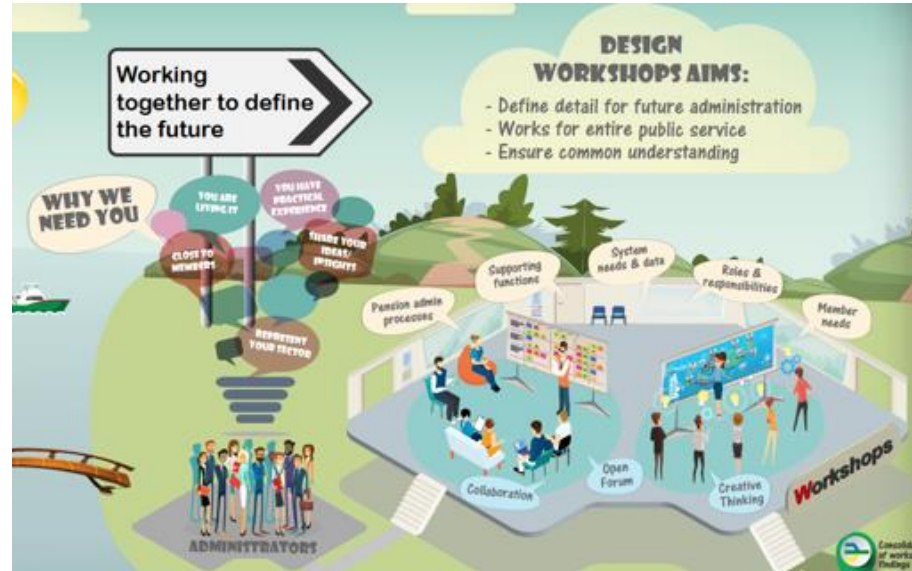
We need your help to shape new **common** business processes for both **Paul (**and all single scheme members) and all **Relevant Authorities**

Single Pension Scheme Administration System (SPSA)

Paul's Portal ⟵⋯⟶ ⟵⋯⟶ **RA Portal**
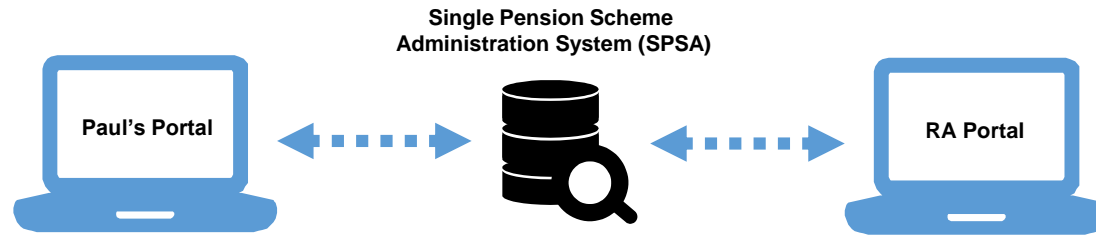
Paul will have access to a portal where he will be able to login and:
- Update his member profile
- View his employment history
- View his total pension contributions
- View his Annual Benefit Statement

RA's will have access to a portal where they will be able to:
- View their single scheme members
- Onboard members
- Add employment records for members

Paul will be interacting with both the Single Pension Scheme Administration (SPSA) and his Relevant Authority

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Let's find out after LUNCH
13:00 – 13:45

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Working Groups and Schedule

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Explain how the work will be organised

Clarify the roles of the working groups

Give rationale for the sequence of work

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Process Design Authority
(½ day session)

- Review proposals from a public-service wide perspective
- Aim for common, streamlined outputs
- Sign-off on the recommended end-to-end processes

Core Process Working Group

Develop the basics
(2 day session)

- Develop proposed end-to-end processes in greater detail considering full public service
- Aim for common processes across all sectors
- Identify the key data required at each stage

Sectoral Process Working Groups
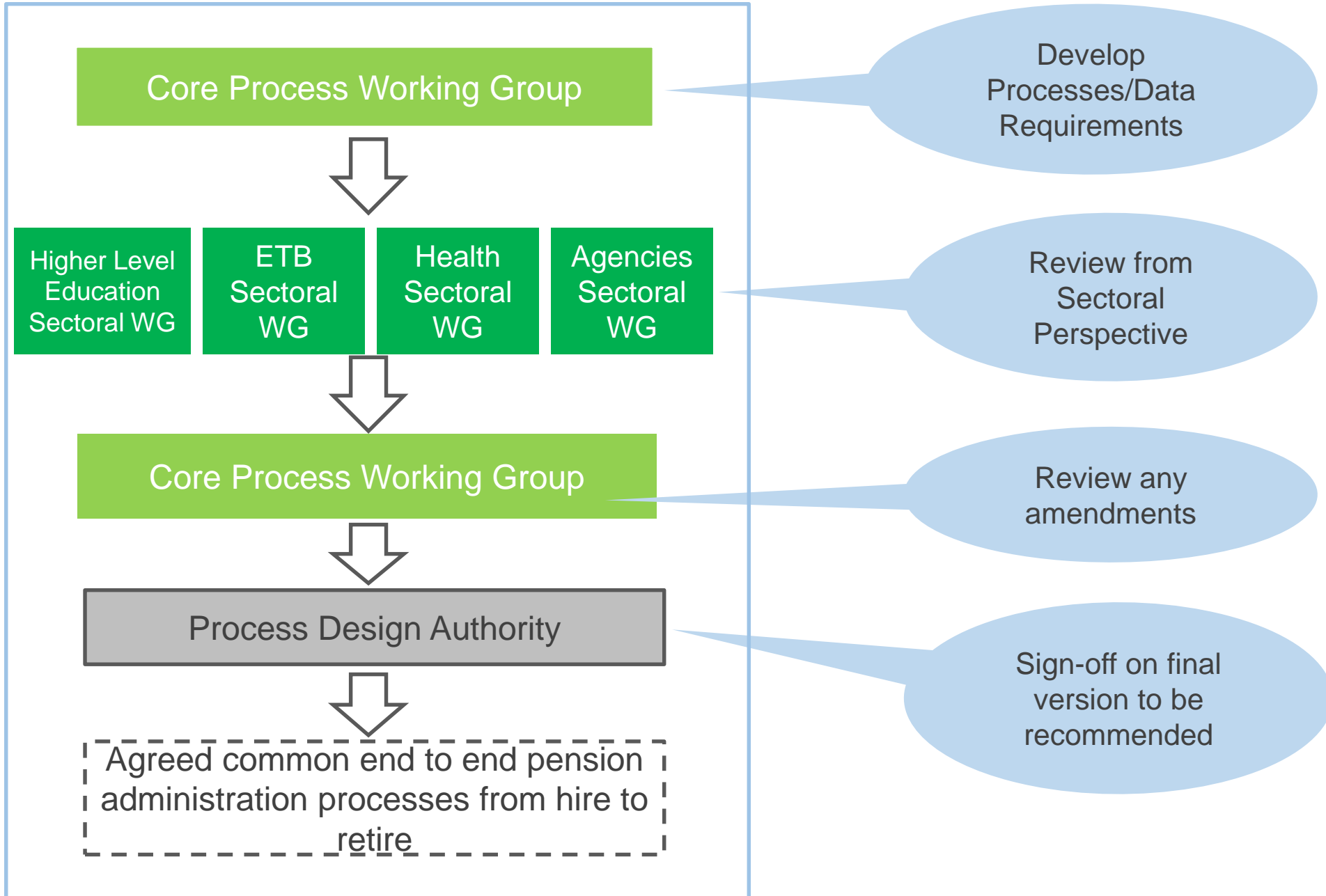Review/Confirm details
(1 day session)

Unis / IOTs	ETBs	Health	Agencies / Small Bodies

- Review proposed processes and data to be captured
- Identify if there are any sectoral-wide variations that are absolutely essential
- Consider work involved in implementation within the sector

⚠️ At the next coffee break, meet with working group colleagues and agree start/end times/locations for each session

No.	Event	Category	Location	Date of session
1	Induction	All	Dublin	11 September 2018
2	Onboarding, Annual Admin & End to End	Core process working group	Athlone	19 /20 September 2018
3	Onboarding, Annual Admin & End to End	Sectoral working group - ETB	Naas	25 September 2018
4	Onboarding, Annual Admin & End to End	Sectoral working group - Third Level	Dublin	26 September 2018
4	Onboarding, Annual Admin & End to End	Sectoral working group - Health	Dublin	27 September 2018
5	Onboarding, Annual Admin & End to End	Sectoral working group - Agencies	Dublin	01 October 2018
7	Leave and Retire	Core process working group	Tullamore	09 /10 October 2018
8	Onboarding and Annual Admin	Process Design Authority	Dublin	11 October 2018
9	Leave and Retire	Sectoral working group - Third Level	Dublin	17 October 2018
10	Leave and Retire	Sectoral working group - ETB	Naas	18 October 2018
11	Leave and Retire	Sectoral working group - Agencies	Dublin	23 October 2018
12	Leave and Retire	Sectoral working group - Health	Tullamore	24 October 2018
13	Leave and Retire	Process Design Authority	Tullamore	06 November 2018
14	Death, Beneficiary & Others	Core process working group	Tullamore	07/08 November 2018
15	Death, Beneficiary & Others	Sectoral working group - Third Level	Dublin	14 November 2018
16	Death, Beneficiary & Others	Sectoral working group - Agencies	Dublin	15 November 2018
17	Death, Beneficiary & Others	Sectoral working group - Health	Dublin	20 November 2018
18	Death, Beneficiary & Others	Sectoral working group - ETB	Naas	21 November 2018
19	Death, Beneficiary & Others	Process Design Authority	Dublin	27 November 2018
20	Wrap Up	Core process working group	Tullamore	04 / 05 December 2018

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- Today in the room we have:
  - Representatives from over 30 organisations
  - On behalf of 6 sectors
  - Who use more than 15 different HR, payroll & pensions systems
  - From RAs of various sizes (staff of 35 – 100k)
  - Bringing their own experiences of HR & pensions administration
- We want to leverage all this experience in the coming months

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Workshop Formats

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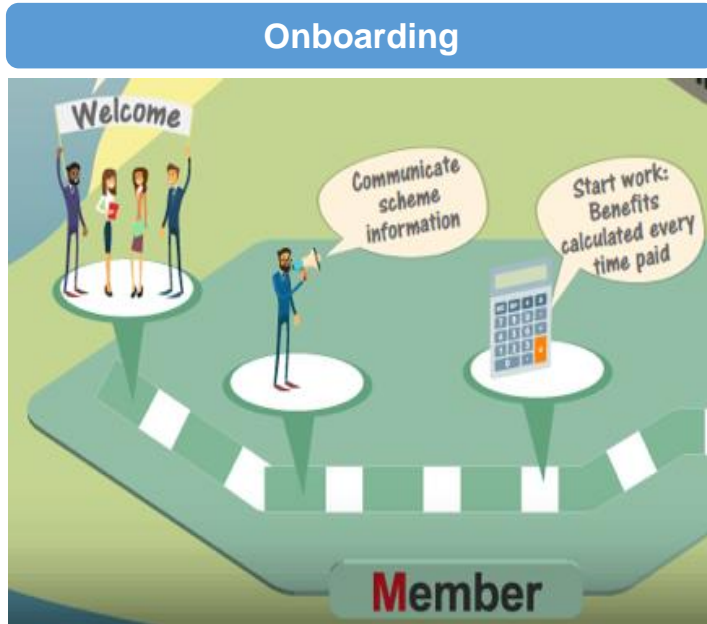We will be looking at Paul's future Single Scheme Journey across each process area.

And……
We need **your input** ☺

Agree on a common set of future business processes for all RAs for the Single Scheme, supported by a highly automated ('Digital First') pensions administration system and shared administration function

Onboarding | Employment (incl. annual admin activities) | Leave / Retire | Death

- Walk through process steps for each process area based on blueprint process maps
- A view to stimulate constructive discussion
- Workshop resourcing
  - One facilitator
  - Workshop scribe to capture notes, actions and decisions

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How will each workshop run?

Onboarding

Welcome

Communicate scheme information

Start work: Benefits calculated every time paid

Member

Facilitator

The facilitator will:
- Introduce the workshop goals and agenda
- Maintain workshop flow and schedule
- Ask questions and promote discussion
- Seek balance of opinions across all sectors
- Work with participants to agree common processes for single scheme administration

- Each workshop will focus on a particular process area e.g. Onboarding

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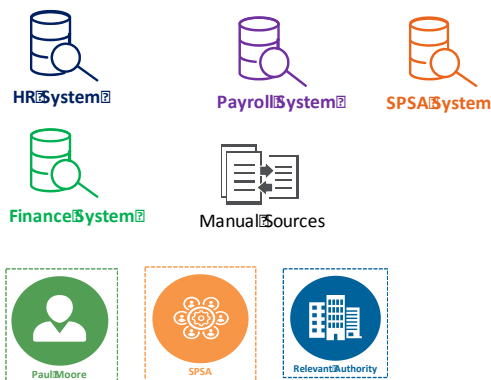Department of Public Expenditure and Reform
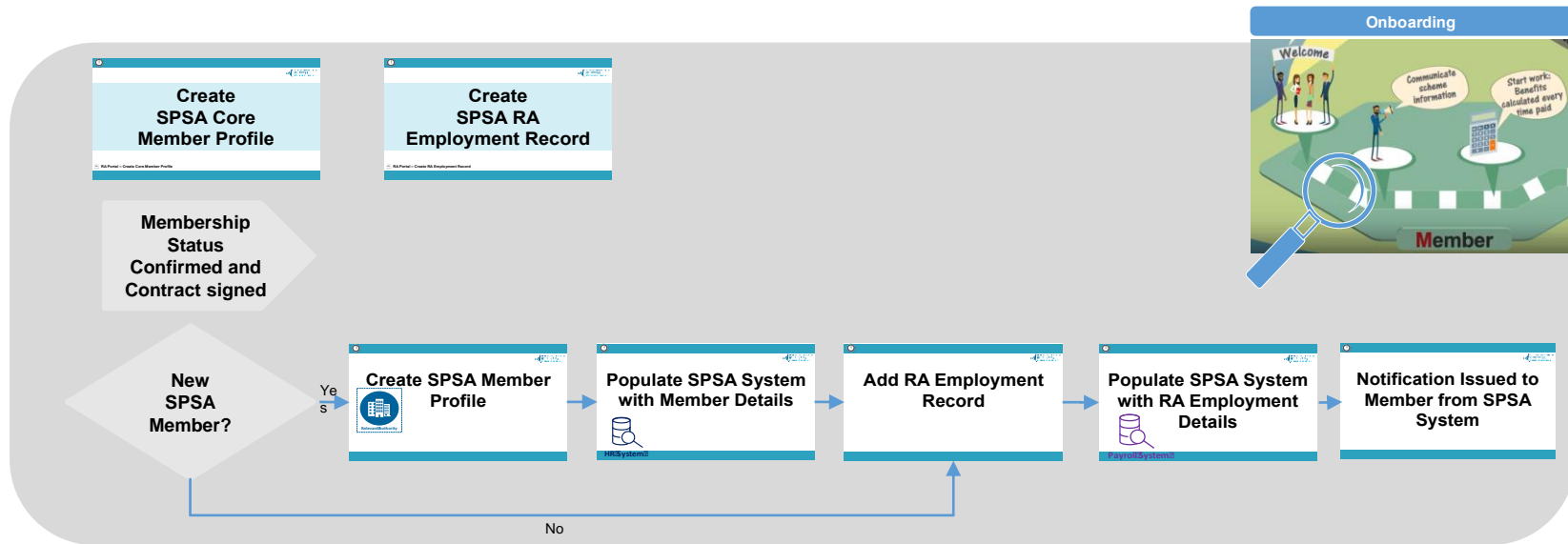
We will need you to tell us what information will be required across each of the process steps

- o Inputs – data required, forms etc.
- o Outputs
- o Local RA system updates – what information is currently available, what steps do you take on local finance / HR Systems
- o Agreeing roles across process steps

Onboarding

Welcome

Communicate scheme information

Start work: Benefits calculated every time paid

Member

- Capture information on process steps
  - Process steps – note input and feedback from participants
  - Systems – automated, manual
  - Data / information exchange
  - Agreed roles
  - Follow up actions including open questions

- Sample data cards will be made available to stick on each process step to indicate the type of information we are looking for

HR System

Payroll System

SPSA System

Finance System

Manual Sources

Paul Moore

SPSA

Relevant Authority

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Walkthrough / Demonstration

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Input required from our working group members

In advance of each Workshop

- Review the overall objectives of the Single Scheme

- Review agenda and Process Area specific questions (circulated in advance)

- Familiarise yourself with any other documents circulated in advance

- Prepare
  - ✓ Understand the process – data and forms being captured
  - ✓ Understand the systems in place in your RA
  - ✓ Speak with your colleagues (HR/Payroll/Pensions) – get their input
    what information do they capture and need to manage single scheme members

- Make note of questions you would like to bring up in the different workshops

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During the Workshop

- Participation is key...
  - ✓ Focus on achieving the outcomes for the single scheme
  - ✓ Provide feedback
  - ✓ Suggest amendments / improvements

- Try not to focus on how things are currently being done... **Think the future**

- Bring solutions

- Focus on the common scenarios

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Post-Workshop
▪ Follow up on actions agreed at the workshop ▪ Findings will be documented and brought to the next phase (e.g. output from Core Working Group -> Sectoral Working Group) ▪ Address any points of clarification

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Process Design Authority

Martina Hennessy

Core Processing WG

Claudia Carr

ETB Sectoral WG

Kieran Monks

Higher Education WG

Carol Ng

Health WG

Shane Hennessy

Agencies WG

Ian Corrigan

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Update on Related Activities

Purpose of this session

Make you aware of related design activities

Share the indicative timeline

Highlight key decision to be made

Outline decision making process

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Key Considerations for the Vision of the Single Scheme Administration

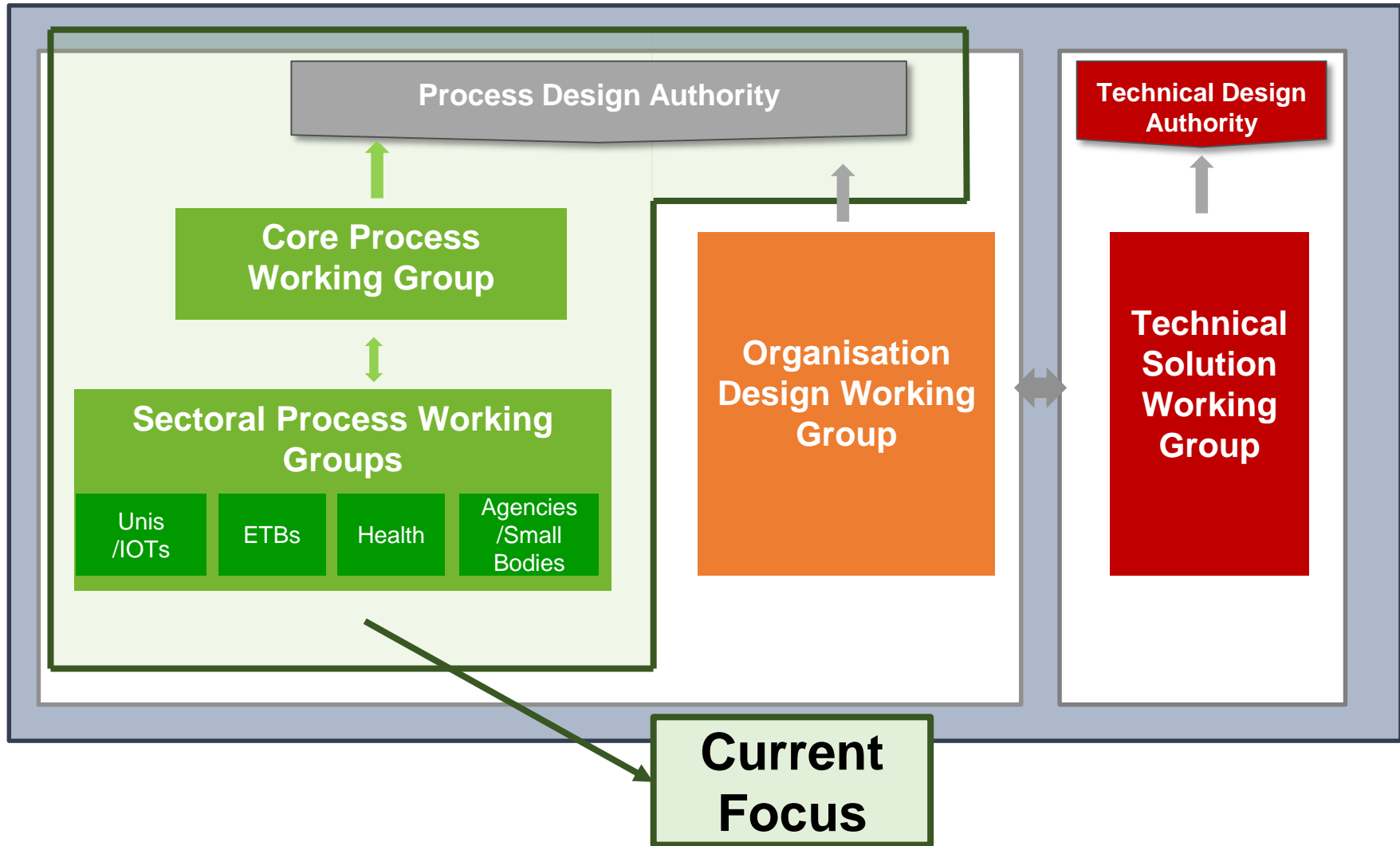**Support the needs of Single Scheme**

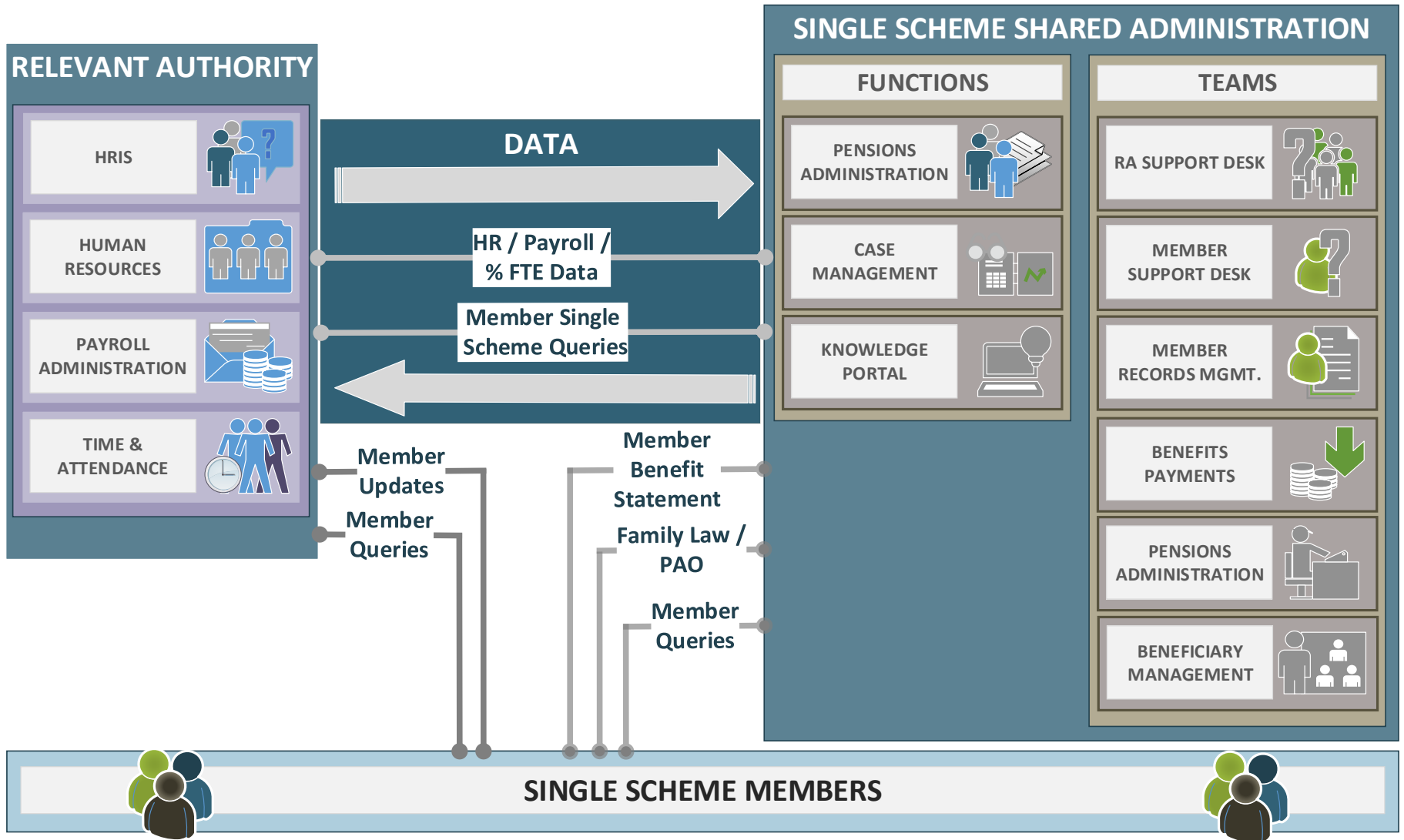**Put the Member first**

Empowered and skilled workforce

Adopt technology capabilities

Performance driven culture

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Sept	Oct	Nov	Dec		Jan	Feb	Mar	Apr	May	Jun	Jul
		2018					2019				

Increasing Detail

Process Design

Data and Technical Assessment

Document Options

Decision Process

Detailed Design

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Learn from experiences elsewhere
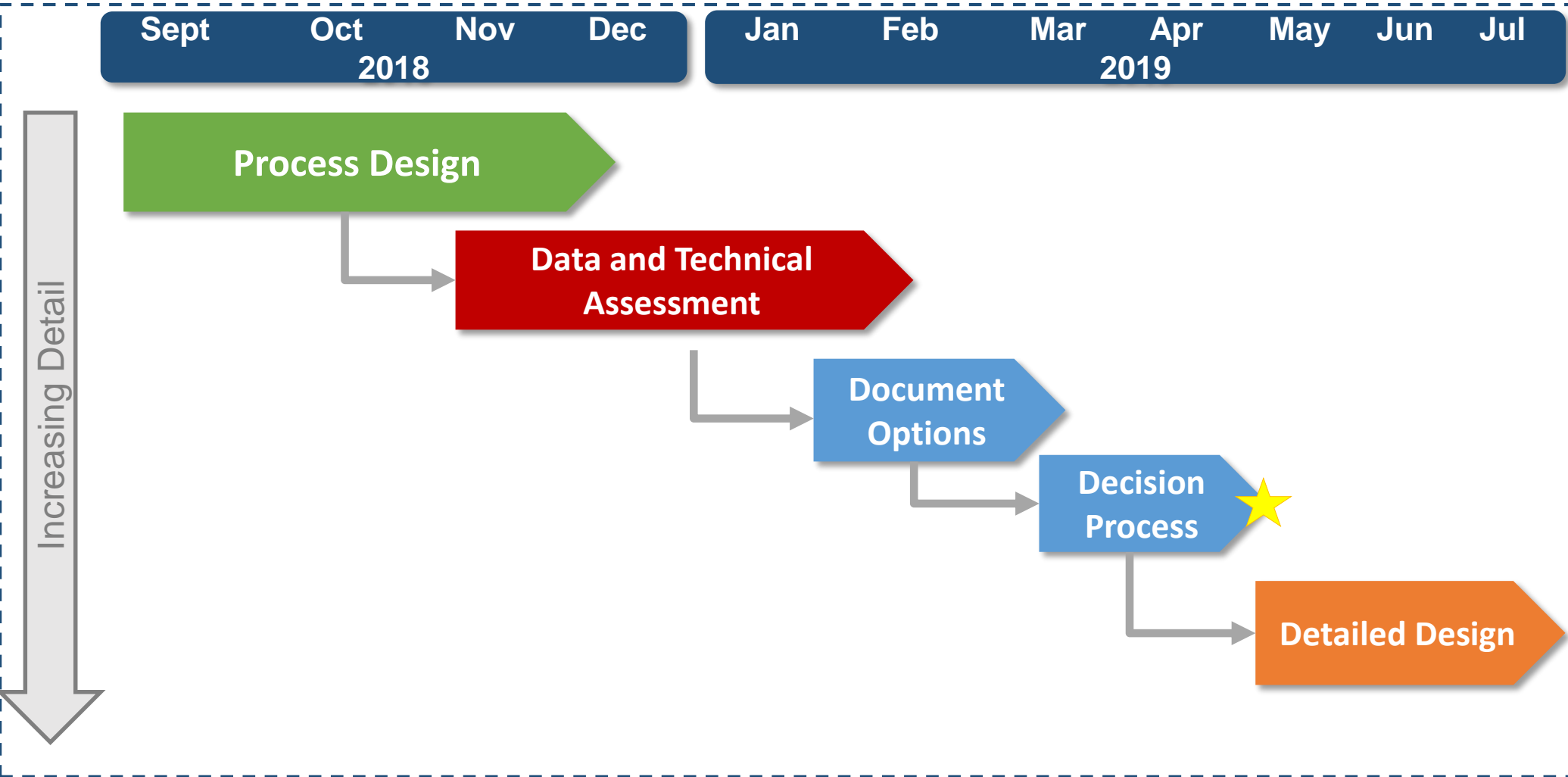

SPPA
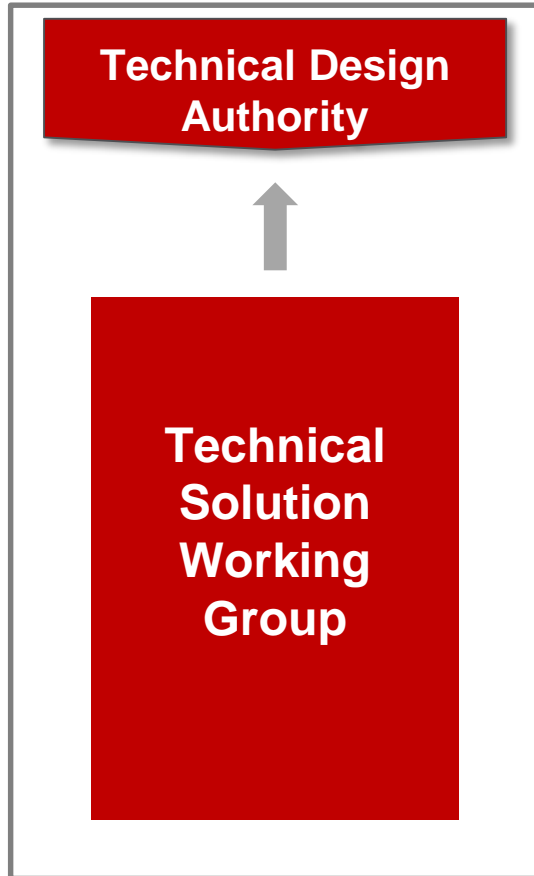SCOTTISH PUBLIC PENSIONS AGENCY

Civil Service Pensions (NI)

- Administers pensions for several sectors
- Set up more than 20 years ago
- Has undergone a lot of change
- Want to examine how the organisation is structured and how work is organised
- Also assess their operational and data management processes, in addition to the technologies in use

- Shared Service for 50 Government departments/offices
- Intend examining their processes and data capture in depth
- Learn from a practical/operational perspective
- Inform decisions that Process Design Authority will be making

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Technical Design Authority

↑

Technical Solution Working Group

- Working Group will review:
  - Data requirements identified in process work
  - Data availability
  - Mechanisms for data transfer
  - Strategy for member data from 2013

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Next Steps

- Review questions in your pack in advance of the next workshop

- Talk to colleagues in various functions to get more information as needed

- We'll email to confirm the agreed start/end times for each group

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Other Single Scheme Activities

Training

- Re-run of 'Recruitment and Onboarding' module in October for new staff
- New modules on 'Retirements and Deaths' from November
  - *Organisations participating in the design workshops will receive invitations to attend sessions in early 2019*

Administrator FAQs

- Will shortly be updated based on work completed in the Health sector
- Look out for email communication in the next few weeks

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www.singlepensionscheme.gov.ie

singleschemequeries@per.gov.ie

! Any personal data/attachments submitted with queries must be anonymised !

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FULL STEAM AHEAD

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