



ORGANISATION/SERVICE ASSESSED  
**HAMPSHIRE PENSION SERVICES**

PREPARED BY  
**NEIL POTENTIER, ASSESSOR**

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# 1. INTRODUCTION AND BACKGROUND

Hampshire County Council Pensions Service (referred to as HPS throughout this report) is based within the Corporate Operations Department of Hampshire County Council.

HPS has recently rebranded as Hampshire Pension Services, which has led to the successful acquisition of two new customers, Hillingdon and Westminster. As a result, HPS now provide pension services to over 334,000 customers, and 16 additional staff have been recruited to cope with the extra workload. The membership continues to be divided between Pensioners, Active Members and Deferred Members.

Despite the current Covid-19 situation, HPS remains passionate about using the CSE (Customer Service Excellence) Standard to drive and validate excellent services. This review provided the opportunity for HPS to demonstrate how well the challenges of Covid-19 have been met and how services are being shaped for the future.

## 2. METHODOLOGY

HPS submitted an update against the 57 elements from the CSE Standard via Assessment Services' Online tool. This led to a desktop review on 24th January 2022, with the evidence gathering review conducted remotely on 26th January 2022.

The day commenced with the CSE Team providing an overview of what has happened at HPS over the last 12 months. Members of the CSE Team were also able to answer questions arising from the desktop review.

A meeting then took place with the Head of HPS to discuss how, against the current backdrop, an ongoing commitment to putting customers first was being maintained. This was followed by a meeting with a Project Manager working with a new customer/partner, Westminster Council.

A further discussion with the CSE Team followed, after which contact was made with three active Members, one Pensioner and two employers. The latter are seen as both customers and partners.

A cross-section of six staff were then interviewed regarding their participation in delivering excellent services. The meeting focused on their levels of empowerment with regard to providing services, and how HPS had adopted their insight into identifying and making service improvements.

The day concluded with a feedback session to the CSE Team on strengths, areas for continuous improvement and the overall position against the CSE Standard.

### 3. SUMMARY OF STRENGTHS

Sections: **2.1.1, 2.2.4, 3.3.1, 4.1.2, 4.2.4, 4.3.1**

HPS continue to ask staff to record tasks and projects on a template. The templates ask staff to assess the impact of their efforts on customers. Recently, staff have been involved in reviewing the templates and confirming their effectiveness. This approach is seen as best practice and helps further embed a customer-focused ethos. The numerous templates also demonstrate the wide use of staff insight in delivering services. (Reference Compliance Plus for Elements 2.2.4 & 4.2.4).

Covid-19 continues to force the acceleration of the digital agenda. The outcome is that several new online services are now available for both employers (via the Employer Hub) and Members (via the Member Portal). These access channels have been further enhanced over the last 12 months, with a 'My Messages' function now added to the Employer Hub. (Reference Compliance Plus for Element 3.3.1).

Performance concerning the eight key measures of success continues to exceed both the internal targets set and national industry targets. Results are clearly publicised through the 'How Are We Doing?' page on the website and within the Annual Report. Performance now includes the two recently acquired employers, Hillingdon and Westminster. (Reference Compliance Plus for Element 4.1.2).

HPS continues to improve the performance of the West Sussex Pension Fund to the extent that the issuing of Annual Benefit Statements is now at 100% for Deferred Members and 99.04% for Active Members. There are now no gaps in information that were causing previous issues. (Reference Compliance Plus for Element 4.3.1).

A new Compliance Plus was identified during the review, namely:

HPS has had a long-standing commitment to using the CSE Standard to drive and validate excellent services. Typical of this is the continued use of a template used by staff to submit evidence of tasks they have undertaken to deliver excellent service or improve services. The annual rotation of staff onto a CSE Team also bears testimony to this commitment. (Reference Compliance Plus for Element 2.1.1).

## 4. AREAS FOR CONTINUOUS IMPROVEMENT

Sections: **1.3.4, 2.1.6, 2.2.1, 4.1.1**

The method for measuring customer satisfaction is moving from using eight key performance indicators (KPIs) to one specific question on customer satisfaction ('are you satisfied?'). Consideration may be given as to how this can create an initial customer satisfaction score creating a baseline from which yearly increase targets can be set. Doing so could also help further embed a continuous improvement culture and help drive increased customer satisfaction. (Reference Element 1.3.4).

The continued use of templates for staff to record service improvements linked to the CSE Standard continues as best practice. However, with the advent of 30 new employees, consideration may be given as to how to gain their buy-in to this process. This could instil a customer-focused culture amongst all new starters by enabling them to proactively take ownership of improvements. (Reference Element 2.1.6).

HPS is currently exploring new ways of working after the Covid-19 pandemic, including whether staff should be attending the offices on a regular basis. Early signs suggest home-working is a preference. However, HPS may wish to consider how working within the office can be achieved so that staff can engage with one another again and meet the new starters face-to-face. This could help establish a stronger team spirit and allow more opportunities to participate in a customer-focused culture. (Reference Element 2.1.6).

Development Tasks continue as a strength, with their effectiveness confirmed by a new starter. However, consideration may still need to be given as to how these might be delivered to existing staff as a form of refresher training. This could help identify any gaps in knowledge that longer serving staff members may need to address. Consideration may also be given as to individuals learning styles prior to commencing the Development Tasks. (Reference Element 2.2.1).

HPS continues to perform exceedingly well with regard to its eight KPIs. Consideration may now be given as to how a further stretch could be applied to make these even more challenging and how the time-frames may be looked into to do this. This could help further embed an appetite for continuous improvement and help drive even more impressive performance data. (Reference Element 4.1.1).

## 5. ASSESSOR'S FINDINGS

- Not Compliance
- Partial Compliance
- Compliance
- Compliance Plus
- N/A

### I - CUSTOMER INSIGHT

#### 1.1 Customer Identification

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- **1.1.1** **We have an in-depth understanding of the characteristics of our current and potential customer groups based on recent and reliable information.**  
As per 2021.
- **1.1.2** **We have developed customer insight about our customer groups to better understand their needs and preferences.**  
HPS has met Pensioner preferences to complete forms manually and return these by post. In addition, the onboarding of a new employer customer (Hillingdon) was structured to meet their needs for a staggered movement towards end of the month payments.
- **1.1.3** **We make particular efforts to identify hard to reach and disadvantaged groups and individuals and have developed our services in response to their specific needs.**  
As per 2021.

#### 1.2 Engagement & Consultation

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- **1.2.1** **We have a strategy for engaging and involving customers using a range of methods appropriate to the needs of identified customer groups.**  
As per 2021, with a review undertaken. (See Element 1.2.3).
- **1.2.2** **We have made the consultation of customers integral to continually improving our service and we advise customers of the results and action taken.**  
Through engagement via Focus Groups, HPS identified a need to incorporate specific web pages on current topics. For example, a dedicated page has been created for updates on the McCloud Remedy (a solution to recent discriminatory case outcomes). A one-time passcode process has also been introduced for access to the Members Portal.
- **1.2.3** **We regularly review our strategies and opportunities for consulting and engaging with customers to ensure that the methods used are effective and provide reliable and representative results.**  
HPS use customer surveys to engage with Pensioners. They now split the data quarterly, which has helped improve analysis and helps more clearly show if HPS is improving over time. Greater use is also being made of Focus Groups to gather feedback from employers.

#### 1.3 Customer Satisfaction

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- **1.3.1** **We use reliable and accurate methods to measure customer satisfaction on a regular basis.**  
HPS has changed its measures for customer satisfaction and has now arrived at a one-question approach - 'Are You Satisfied?'. This will hopefully generate more responses and create a new baseline score from which HPS can apply an annual stretch.
- **1.3.2** **We analyse and publicise satisfaction levels for the full range of customers for all main areas of our service and we have improved services as a result.**  
An example of an improvement that resulted from survey feedback shows how the new one-time passcode for the Members Portal was introduced.

- **1.3.3** **We include in our measurement of satisfaction specific questions relating to key areas including those on delivery, timeliness, information, access, and the quality of customer service, as well as specific questions, which are informed by customer insight.**  
As per 2021.
- **1.3.4** **We set challenging and stretching targets for customer satisfaction and our levels are improving.**  
HPS has met all eight of its KPIs, which is seen as an inference of satisfied customers. However, to avoid any assumptions about service quality, HPS is replacing the KPIs as an indicator of customer satisfaction with a one-question approach ('are you satisfied?') that will provide a new baseline score for customer satisfaction. For the last 12 months, scores were obtained on various satisfaction levels; for example, Members who felt 'extremely satisfied' with the service received has increased from 27% to 57%. Scores for 'not at all well' satisfied have reduced from 30% to 15%.
- **1.3.5** **We have made positive changes to services as a result of analysing customer experience, including improved customer journeys.**  
The one-time passcode has improved Member journeys by providing a texted passcode which has speeded up access to the Member Portal considerably. A new bell system also notifies Members when further information has been uploaded onto their account.

## 2 - THE CULTURE OF THE ORGANISATION

### 2.1 Leadership, Policy and Culture

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- **2.1.1** **There is corporate commitment to putting the customer at the heart of service delivery and leaders in our organisation actively support this and advocate for customers.**  
This Element is Compliance Plus. (See Summary of Strengths).
- **2.1.2** **We use customer insight to inform policy and strategy and to prioritise service improvement activity.**  
HPS obtain customer feedback via surveys, and this informs policy. For example, feedback resulted in changes relating to the policy on implementing the McCloud Remedy, with HPS quick to adopt a policy for dealing with this complex issue. Feedback also continues to influence the evolution of the Employer Hub and the Member Portal.
- **2.1.3** **We have policies and procedures which support the right of all customers to expect excellent levels of service.**  
As per 2021.
- **2.1.4** **We ensure that all customers and customer groups are treated fairly and this is confirmed by feedback and the measurement of customer experience.**  
As per 2021.
- **2.1.5** **We protect customers' privacy both in face-to-face discussions and in the transfer and storage of customer information.**  
As per 2021.
- **2.1.6** **We empower and encourage all employees to actively promote and participate in the customer focused culture of our organisation.**  
As a consequence of the Covid-19 pandemic, staff are enjoying high levels of personal empowerment and can make their own decisions in their dealings with customers. The availability of development tasks also facilitates empowerment. These sequential tasks allow staff to build their skill-set to the extent they can take on more tasks and become more autonomous - 'I was shown something and the left to get on with it. I even changed the processing notes to make them friendlier'.

### 2.2 Staff Professionalism and Attitude

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- **2.2.1 We can demonstrate our commitment to developing and delivering customer focused services through our recruitment, training and development policies for staff.**  
There has been considerable recruitment over the last 12 months, with 16 new staff taken on primarily to meet the workload associated with the two new employers. New starters interviewed confirmed online induction and training with a strong customer content. Subsequent training also includes support from all colleagues - 'Knowledge sharing is tremendous here. It helps you get up to speed quickly and builds your confidence to deal with customers'.
- **2.2.2 Our staff are polite and friendly to customers and have an understanding of customer needs.**  
As per 2021, with customers interviewed confirming high levels of politeness and friendliness.
- **2.2.3 We prioritise customer focus at all levels of our organisation and evaluate individual and team commitment through the performance management system.**  
As per 2021.
- **2.2.4 We can demonstrate how customer facing staff insights, and experiences are incorporated into internal processes, policy development and service planning.**  
This Element is Compliance Plus. (See Summary of Strengths).
- **2.2.5 We value the contribution our staff make to delivering customer focused services, and leaders, managers and staff demonstrate these behaviours.**  
As per 2021.

### 3 - INFORMATION AND ACCESS

#### 3.1 Range of Information

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- **3.1.1 We make information about the full range of services we provide available to our customers and potential customers, including how and when people can contact us, how our services are run and who is in charge.**  
As per 2021, with improvements made. (See Element 3.2.3).
- **3.1.2 Where there is a charge for services, we tell our customers how much they will have to pay.**  
As per 2021.

#### 3.2 Quality of Information

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- **3.2.1 We provide our customers with the information they need in ways which meet their needs and preferences, using a variety of appropriate channels.**  
As per 2021.
- **3.2.2 We take reasonable steps to make sure our customers have received and understood the information we provide.**  
As per 2021.
- **3.2.3 We have improved the range, content and quality of verbal, published and web based information we provide to ensure it is relevant and meets the needs of customers.**  
HPS continue to make ongoing improvements with the website. Dedicated pages have been created for current news, and new icons are being used to improve searches and navigation. More updates and notifications are also communicated electronically via the Employer Hub and Member Portal - 'The Portal now has a dynamic home page.'
- **3.2.4 We can demonstrate that information we provide to our customers is accurate and complete, and that when this is not the case we advise customers when they will receive the information they requested.**  
As per 2021.

## 3.3 Access

- **3.3.1** **We make our services easily accessible to all customers through provision of a range of alternative channels.**  
This Element is Compliance Plus. (See Summary of Strengths).
- **3.3.2** **We evaluate how customers interact with the organisation through access channels and we use this information to identify possible service improvements and offer better choices.**  
Ongoing improvements to access channels are based on a constant evaluation of usage and feedback. Feedback via Focus Groups is helping to influence the evolution of the Employer Hub.
- **3.3.3** **We ensure that where customers can visit our premises in person, facilities are as clean and comfortable as possible.**  
As per 2021.

## 3.4 Co-operative working with other providers, partners and communities

- **3.4.1** **We have made arrangements with other providers and partners to offer and supply co-ordinated services, and these arrangements have demonstrable benefits for our customers.**  
Employers are seen as both customers and partners. As partners, they work with HPS to ensure pensions are paid to Members accurately and on time. The data provided by employers to HPS is therefore critical. New employers, Hillingdon and Westminster, worked tirelessly with HPS to ensure a smooth transition during the onboarding process.
- **3.4.2** **We have developed co-ordinated working arrangements with our partners that ensure customers have clear lines of accountability for quality of services.**  
Regular meetings were held with Hillingdon and Westminster to ensure a smooth transition for Members. HPS make it clear what data is needed by when from employers. Clear lines of accountability are detailed on the website.
- **3.4.3** **We interact within wider communities and we can demonstrate the ways in which we support those communities.**  
As per 2021.

**4 - DELIVERY**

## 4.1 Delivery Standards

- **4.1.1** **We have challenging standards for our main services, which take account of our responsibility for delivering national and statutory standards and targets.**  
As per 2021.
- **4.1.2** **We monitor and meet our standards, meet departmental and performance targets, and we tell our customers about our performance.**  
This Element is Compliance Plus. (See Summary of Strength).
- **4.1.3** **We consult and involve customers, citizens, partners and staff on the setting, reviewing and raising of our local standards.**  
As per 2021.

## 4.2 Staff Professionalism and Attitude

- **4.2.1** **We agree with our customers at the outset what they can expect from the service we provide.**  
As per 2021.

- **4.2.2 We can demonstrate that we deliver the service we promised to individual customers and that outcomes are positive for the majority of our customers.**  
In addition to excellent satisfaction data, customers interviewed are very satisfied with the services they are receiving from HPS. Pensioners commented - 'They are very responsive, approachable and flexible' and 'The Portal is easy to use and a mine of information'. Employers (as customers) said - 'HPS are very hands-on and are keen to get our records correct' and - 'I am very impressed with the customer service provided'.
- **4.2.3 We can demonstrate that we benchmark our performance against that of similar or complimentary organisations and have used that information to improve our service.**  
HPS has benchmarked on information and guidance given by other providers on the McCloud Remedy and has created a dedicated webpage as a result.
- **4.2.4 We have developed and learned from best practice identified within and outside our organisation, and we publish our examples externally where appropriate.**  
This Element is Compliance Plus. (See Summary of Strengths).

#### 4.3 Deal effectively with problems

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- **4.3.1 We identify any dips in performance against our standards and explain these to customers, together with action we are taking to put things right and prevent further recurrence.**  
This Element is Compliance Plus. (See Summary of Strengths).
- **4.3.2 We have an easy to use complaints procedure, which includes a commitment to deal with problems fully and solve them wherever possible within reasonable time limit.**  
As per 2021, with a review of the complaints procedure. (See Element 4.3.5).
- **4.3.3 We give staff training and guidance to handle complaints and to investigate them objectively, and we can demonstrate that we empower staff to put things right.**  
As per 2021, with guidance now given to new starters during induction.
- **4.3.4 We learn from any mistakes we make by identifying patterns in formal and informal complaints and comments from customers and use this information to improve services and publicise action taken.**  
There have been only two complaints that have escalated to the IDR (Independent Dispute Resolution Process). HPS uses a Compliment, Comment and Suggestion spreadsheet and responds to all negative comments. An example shows how there were some concerns from new customers from Hillingdon regarding the switch to an end of month payment date. Specific arrangements were made for these customers.
- **4.3.5 We regularly review and improve our complaints procedure, taking account of the views of customers, complainants and staff.**  
Following a review of the complaints procedure, Touchpoint software was expanded to record all phone calls so that they could be used for training purposes.
- **4.3.6 We ensure that the outcome of the complaint process for customers, whose complaint is upheld, is satisfactory for them.**  
The two complaints referred to the IDR will undergo a full investigation and response.

## 5 - TIMELINESS AND QUALITY OF SERVICE

### 5.1 Standards for Timeliness and Quality

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- **5.1.1 We set appropriate and measurable standards for the timeliness of response for all forms of customer contact including phone calls, letters, e-communications and personal callers.**  
As per 2021.

- **5.1.2 We set comprehensive standards for all aspects of the quality of customer service to be expected in all dealings with our organisation.**

As per 2021.

## 5.2 Timely Outcomes

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- **5.2.1 We advise our customers and potential customers about our promises on timeliness and quality of customer service.**

As per 2021.

- **5.2.2 We identify individual customers needs at the first point of contact with us and ensure that an appropriate person who can address the reason for contact deals with the customer.**

As per 2021.

- **5.2.3 We promptly share customer information with colleagues and partners within our organisation whenever appropriate and can demonstrate how this has reduced unnecessary contact for customers.**

All phone calls are now recorded, allowing for sharing of experiences, particularly around complaints. New starters also confirmed that knowledge is shared amongst all teams to help them to become more autonomous. This minimises the occasions that new staff need to transfer a call.

- **5.2.4 Where service is not completed at the first point of contact we discuss with the customer the next steps and indicate the likely overall time to achieve outcomes.**

As per 2021.

- **5.2.5 We respond to initial enquiries promptly, and if there is a delay we advise the customer and take action to rectify the problem.**

As per 2021.

## 5.3 Achieved Timely Delivery

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- **5.3.1 We monitor our performance against standards for timeliness and quality of customer service and we take action if problems are identified.**

As per 2021.

- **5.3.2 We are meeting our current standards for timeliness and quality of customer service and we publicise our performance against these standards.**

HPS is currently meeting all of their targets for the timeliness and quality of service, which are part of its main KPIs. All currently stand at 100%.

- **5.3.3 Our performance in relation to timeliness and quality of service compares well with that of similar organisations.**

HPS has made some recent comparisons with pension funds in Dorset and Buckinghamshire. Results show they exceed both with regard to the achievement of industry-standard key measures. These relate to both the timeliness and quality of service.

## 6. CONCLUSION AND RECOMMENDATIONS

There are no actions that require immediate attention and I am pleased to pass on to Assessment Services Ltd's Certification Committee my recommendation that you remain certificated as meeting the Customer Service Excellence Standard. Certification is valid for three years from the Certification Committee's decision date and subject to ongoing annual reviews as follows:

Annual Review Year 2 - January 2023

3-Year Review - January 2024

Annual Review Year 1 - January 2025

I would like to take this opportunity to thank you for your kind cooperation during this review.

Neil Potentier

CSE Assessor for Assessment Services Ltd.

31st January 2022

## 7. COMPLIANCE AGAINST THE CUSTOMER SERVICE EXCELLENCE STANDARD

### 1 - Customer Insight

	Element	Accreditation
1.1	1.1.1	● Compliance
	1.1.2	● Compliance
	1.1.3	● Compliance
1.2	1.2.1	● Compliance
	1.2.2	● Compliance
	1.2.3	● Compliance
1.3	1.3.1	● Compliance
	1.3.2	● Compliance
	1.3.3	● Compliance
	1.3.4	● Compliance
	1.3.5	● Compliance

### 2 - The Culture of the Organisation

	Element	Accreditation
2.1	2.1.1	● Compliance Plus
	2.1.2	● Compliance
	2.1.3	● Compliance
	2.1.4	● Compliance
	2.1.5	● Compliance
	2.1.6	● Compliance
2.2	2.2.1	● Compliance
	2.2.2	● Compliance
	2.2.3	● Compliance
	2.2.4	● Compliance Plus
	2.2.5	● Compliance

### 3 - Information and Access

	Element	Accreditation
3.1	3.1.1	● Compliance
	3.1.2	● Compliance
3.2	3.2.1	● Compliance
	3.2.2	● Compliance
	3.2.3	● Compliance
	3.2.4	● Compliance

	Element	Accreditation
3.3	3.3.1	● Compliance Plus
	3.3.2	● Compliance
	3.3.3	● Compliance
3.4	3.4.1	● Compliance
	3.4.2	● Compliance
	3.4.3	● Compliance

#### 4 - Delivery

	Element	Accreditation
4.1	4.1.1	● Compliance
	4.1.2	● Compliance Plus
	4.1.3	● Compliance
4.2	4.2.1	● Compliance
	4.2.2	● Compliance
	4.2.3	● Compliance
	4.2.4	● Compliance Plus
4.3	4.3.1	● Compliance Plus
	4.3.2	● Compliance
	4.3.3	● Compliance
	4.3.4	● Compliance
	4.3.5	● Compliance
	4.3.6	● Compliance

#### 5 - Timeliness and Quality of Service

	Element	Accreditation
5.1	5.1.1	● Compliance
	5.1.2	● Compliance
5.2	5.2.1	● Compliance
	5.2.2	● Compliance
	5.2.3	● Compliance
	5.2.4	● Compliance
	5.2.5	● Compliance
5.3	5.3.1	● Compliance
	5.3.2	● Compliance
	5.3.3	● Compliance