

H2

**FINANCE
INNOVATION
FORUM**

PENSIONS RETIREMENT PRESENTATION

LEEDS TEACHING HOSPITALS NHS TRUST

NORTH EAST AND YORKSHIRE, ACUTE

With special thanks to this team of innovators for taking part in the pilot of this programme and contributing to its development.



**FOR INFORMATION ON THE
INNOVATION PROGRAMME
CLICK HERE**

THE INNOVATORS

This innovation was led by the Trust's in-house pensions team. For further details contact Peter Wellock, deputy payroll manager- systems and pensions, at Leeds Teaching Hospitals NHS Trust.

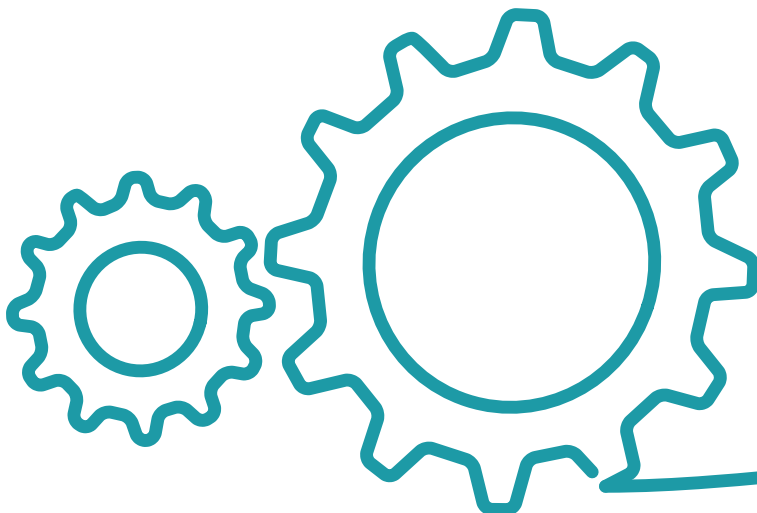
THE PROBLEM

The Covid-19 pandemic meant there was a high demand on the pensions team. New Covid pension regulations, staff absence and social distancing meant our pensions retirement course could not have continued in its usual format.

This course gives potential NHS pension retirees more information about their retirement, the options available to them and the process for retiring. The historical delivery method was that team members would travel to a venue and deliver the course to fewer than 20 potential retirees. This would happen at least four times a month and presenters may give slightly different talks depending on experience or preference.

THE CHALLENGES

- How and do we continue to present the courses in a post Covid world?
- How could we find time to keep the courses running?
- Did we have the technology in place across our client base to make the move on-line?
- Could we just take the course online or do we start again with the whole format of the course?



THE INNOVATION

Social distancing rules really made us look again at the whole retirement course process. It was no longer practical to do four presentations a month at separate venues across our client base in West Yorkshire. Would it ever be again? We engaged with clients and their view was that they would rather see the courses continue online, in any format available. That gave us the chance to innovate.

The team really engaged with the creation of the new presentation as they recognised that the time spent building the presentation would be offset by the considerable saving made by not presenting at multiple sites each month and having to travel and arrange venues. Some even worked on the project in their own time.

Instead of just going online with the format we had already, we decided to totally rethink our approach. The whole pensions team went through the various old presentations, as everyone used to have a separate presentation loosely based around an original. We reviewed everything and found it particularly useful to have feedback from two new members on the team as they could give us a layman's perspective without any preconceptions.

Our decision was to go online, once a month with set

presentations to ensure quality, accuracy and consistency in delivery. This approach produced savings in four areas: presentation time, travel time, travel costs, and CO2. We made sure all our client base were using MS Teams and chose this as our delivery method. The new format allowed us to involve the whole team in the presentation, rather than just relying on three experienced members of the team. This meant we could spread the workload across the team and build in back-up to cover any unforeseen absences.

We decided to make our new presentation interactive, and we embedded video content from the NHS Pensions Agency into the presentation. This had a few benefits as it cut down on the time the team were talking during the presentation which helped build confidence for those who hadn't done any presenting before, and it also produced a consistent message to attendees. Also, we find it generates questions and debate between the videos.

We developed our email invites to not only be a welcome to the course but also took the opportunity to attach useful documents the attendees can look at before they attend to build their basic knowledge, make sure the course is right for them and think of questions they may wish to ask, even before they attend.

THE LESSONS LEARNT

Having reviewed the whole process and writing this innovation submission we literally cannot think of anything we wouldn't do again. We planned and discussed the whole project as a team, generated ideas and then moulded the presentation dynamically as it evolved. We could have done it quicker, but we think that would have been a mistake, it would have put pressure on staff and we would not have had such a good product at the end of the day. As a team we improved our skills in the following areas:

- how to run a course for over 100 people via MS Teams
- how to present professionally to a large group of people (three of the team attended a presentation course which they found really useful)
- all the team are involved now not just three senior staff.

THE OUTPUTS

The headline benefits of the project were:

- a far better product
- consistency of delivery
- a slicker delivery method
- better value for money in time and travel costs
- saving on CO2 for travel.

And it was a great team moral building exercise in a very busy period.

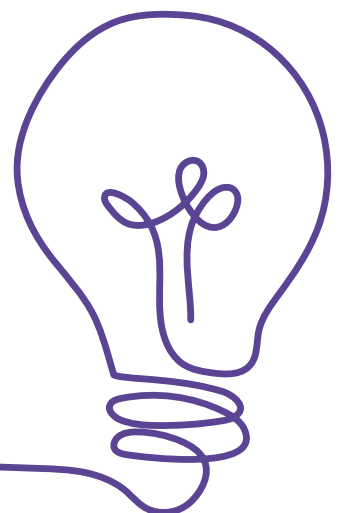
THE OUTCOMES

The benefits of the project were:

- it really brought the team together in what was a challenging and difficult period for everyone. The team worked together brilliantly, helping each other with the vision, ideas, build and critique
- we saved time in the long run which allowed us to deal with all the additional work Covid threw at us and going forwards gives us more time to concentrate on our core functions, helping scheme contributors and ensuring pensions data is accurate and up to date
- we no longer travel across West Yorkshire to various venues, cutting down our carbon footprint
- we have a better more consistent product for the attendees.

THE QUICK WINS

- The quickest win would be for us to share our presentation, please ask us.



THE REVIEWERS SAID

“THIS INNOVATION IS A GREAT EXAMPLE OF HOW IMPROVEMENTS CAN BE MADE USING THE TOOLS AND RESOURCES WE ALREADY HAVE. TAKING THE TIME TO DESIGN THE PROCESS AND IMPLEMENT THE CHANGE WILL CERTAINLY HAVE PROVIDED ADDED VALUE TO YOUR ORGANISATION.”

“IT’S A VERY SIMPLE APPLICATION, BASED ON CHANGES FORCED ON TO MANY WORKING PRACTICES BUT THAT IS WHAT MAKES IT A STRONG CONSISTENT MESSAGE.”

“WHILE THE INNOVATION IS A SIMPLE CONCEPT, THE STANDARDISATION THIS HAS BROUGHT TO THE ORGANISATION IS GREAT.”



WHAT YOU CAN DO NOW

SUBMIT INNOVATION

If you recognise the problem stated and have implemented your own innovation to overcome it please submit this innovation to the programme and give others more examples to learn from.

REGISTER INTEREST

If you recognise the problem stated and would like to know more details about this innovation in particular, we will be hosting showcase and workshop sessions throughout the year, so all interested staff can gain ideas and inspiration from innovators in a manageable one-to-many format.

SUBMIT PROBLEM

If you have a problem but don't currently know of a solution to it, then please submit it here and in 2022 the Forum intends to crowdsource solutions to problems that don't currently have known innovations.

LEARN MORE

If you would like to learn more about about the innovation programme please click for more details.

ENDORSEMENT DISCLAIMER

The Finance Innovation Forum's Innovation Programme asks NHS Finance peer reviewers whether the "Innovation overcomes, successfully addresses, or solves the problem identified". The programme does not endorse, recommended or provide any assurance of software used or mentioned in any of the published innovations. If you think a published innovation is being used to falsely validate a commercial product or company please contact finance.innovation@nhs.net



IN SEPTEMBER 2021 THE FORUM LAUNCHED...

- A national Innovation Programme for NHS Finance staff to submit their innovations for peer review. Successful innovations will be published and accessible to all on the One NHS Finance website
- A 'Software Skills For Finance Staff' event series taught by NHS Finance for NHS Finance including MS Excel, PowerBI, SQL etc.
- An 'Art of the Possible' briefing which explains two new technologies AI & Blockchain and discusses the opportunity for NHS Finance
- An Automation Group to review and improve the efficiency of existing national processes and returns

WHAT YOU CAN DO NOW

- Submit your innovations for peer review
- Sign up to be an innovation peer reviewer
- Read Art of the Possible
- Sign up for Software Skills for Finance
- Register your interest in automation and all things innovative

Innovation Programme



Software Skills



Automation sign up



Be a peer reviewer



Art of the Possible



FURTHER INFORMATION

Website: FinanceInnovation.nhs.uk

Email: FinanceInnovation@nhs.uk

LinkedIn: [One NHS Finance](#)

Twitter: [@OneNHSFinance](#)



One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.



Identifying and developing innovative ways of working and new areas of improvement.