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Good Practices in Social Security

Good practice in operation since: 2015

Optimization of notification and information letters from the German Federal Pension Insurance

German Federal Pension Insurance
Germany

Summary

The German Federal Pension Insurance (Deutsche Rentenversicherung – DRV) is revising its notifications. In order to enable insured people and pensioners to better understand decisions, notifications will become clearer, more comprehensible, and more personal. Pension experts, public relations workers, and external language consultants will ensure that texts are also legally justifiable. The aim is to position the German Federal Pension Insurance as a modern service provider that also reinforces its closeness to its members through its notifications. At the same time, clearer and more comprehensible notifications should ease the burden on advisory services.

The issue or challenge

What was the issue or challenge addressed by your good practice? Please provide a short description.

The intention is for notifications from the German Federal Pension Insurance to be more user-friendly and to further increase the Fund's service quality.

Each year, the German Federal Pension Insurance sends out several million notification and information letters. This is the main channel for communication with members. Surveys have indicated that our notifications could be improved. Their information content was scrutinized in detail, and found to be factual, authoritative, and dependable. However, members want a clearer structure, a more personal style and more understandable language. In collaboration with language experts, the German Federal Pension Insurance is now converting the complex legal fundamentals into a clear form of expression. The new notifications are aimed more at the average citizen than at legal practitioners. At the same time, the experts are ensuring that texts continue to be procedurally sound and in line with current case law.

Addressing the challenge

What were the main objectives of the plan or strategy to resolve the issue or challenge? List and briefly describe the main elements of the plan or strategy, focusing especially on their innovative feature(s) and expected or intended effects.

The aim is to make notifications more user-friendly as the most important "business card" of the German Federal Pension Insurance. They stand for the credibility of the Fund and for the trust of its members. The new notifications should make the decisions of the Fund easier to understand for insured people and pensioners.

Member questionnaires and inquiries among advisory services identified central "weak points" that should, in the view of members and advisers, be improved. This information was used as a basis for the development of an overall concept that can be applied to all notifications from the German Federal Pension Insurance.

The aim is to guide members through the notification as it relates to the calculation of pensions and members' experience of insurance, and to make it easier for them to grasp the concept of the notification through editorial elements such as an annotated table of contents, subheadings and

references. One key objective was to summarize the most important features from the member's point of view so they could be seen at a single glance on the first page.

Targets to be achieved

What were the quantitative and/or qualitative targets or key performance indicators that were set for the plan or strategy? Please describe briefly.

The target was:

- to position the German Federal Pension Insurance as a more modern service provider that also reinforces its closeness to members through its notifications;
- to make pension, medical, and insurance law content more understandable in order to reduce requests for clarification from advisory services and to enable advice to be given at a "higher" level.

Evaluating the results

Has there been an evaluation of the good practice? Please provide data on the impact and outcomes of the good practice by comparing targets vs actual performance, before-and-after indicators, and/or other types of statistics or measurements.

The project was assessed multiple times through quality analyses. The new notifications consistently received high marks. The German Federal Pension Insurance was found to be an innovative service provider with an exemplary character. The results indicated that the medical, pension, and insurance law content was much clearer and better understood. The media were consistent in reacting positively to the project.

Lessons learned

Based on the organization's experience, name up to three factors which you consider as indispensable to replicate this good practice. Name up to three risks that arose/could arise in implementing this good practice. Please explain these factors and/or risks briefly.

Key to the implementation of the project are:

- a detailed overall concept and fine planning, including employee and member surveys;
- the inclusion and motivation of all parties involved in the Pension Fund;
- intensive communication of the project to the public and especially to experts.

Implementation may involve the following risks:

- Intervention in the complex automated process of notification creation is basically a risk and must be prepared accordingly in order to avoid erroneous notifications.
- Experts (legal experts) may take a critical view of improvements in notifications to members. Contradictions and complaints may arise. The legal principles must therefore be guaranteed from the outset in the new notifications. Experts must be informed regularly about the aims and expertise involved in the notification project.