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Good Practices in Social Security

Good practice in operation since: 2016

Efterlevandeguiden.se: A guide for those left behind

Certificate of Merit with Special Mention, ISSA Good Practice Award – Europe competition 2019

Swedish Pensions Agency
Sweden

Summary

The Guide Efterlevandeguiden.se, is a website with aggregated information from the authorities to help those who have recently lost someone close. Launched in September 2016, the service is a unique initiative and collaboration between three Swedish government agencies, namely, the Swedish Social Insurance Agency, the Swedish Pensions Agency and the Swedish Tax Agency.

As a survivor, it may be difficult to know which authority is responsible for what, and who to contact. The Guide collects the information on one website. It describes in the form of a checklist the high priority actions to take when someone close has passed away. The focus is on practical things, e.g., information about what it means to administer the estate of the deceased or to make an estate inventory.

The Guide has received a lot of attention, prizes and commendations, and has become appreciated by survivors and those who meet people in mourning.

The issue or challenge

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

Death is part of life. In Sweden, with a population of 10 million, about 90,000 people die every year, leaving relatives behind. When a person dies, it is not just the grieving for the lost one that needs to be handled – for the survivor, there are many practical things to attend to and a host of contacts with different actors that need to be made.

Main issues:

- lack of support from society;
- many matters to understand and attend to;
- loneliness and worry about one's finances and day-to-day activities;
- risk of being in shock;
- reduced cognitive ability.

Insights from research:

- no overview of what will happen immediately after the death, within a few months, and over the coming year;
- no grasp of what actions to take, and in what order;
- no grasp of what are the most important actions;
- necessary to be met and treated according to needs/feelings/situation.

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 challenge:

- To provide a comprehensive and holistic overview that increases the feeling of security and control of the situation, and that nothing important is missed.

Innovative features:

- “One stop”
 - a holistic perspective when becoming a survivor,
 - facilitates getting information from the proper authority.
- Information across authority boundaries.
- Clear instructions on what to do.
- Content, language, and interface adapted to the survivors’ perspective and situation
 - a uniform and well-thought-out tonality,
 - a conscious choice of wording,
 - well-founded information selection,
 - a consistent appearance.

The Guide collates information on one website. It describes in the form of a checklist the high priority actions to take when someone close has passed away, and the actions that can be postponed. The focus is on practical things, e.g., information about what it means to administer the estate of the deceased or how to make an estate inventory.

The collaborating government agencies left their own interests behind and joined forces to provide to survivors a guide when they need it the most. The development was a human centric design process, based on customer needs “in the event of a partner’s death”. By “life event” we refer to the time when an individual or an entrepreneur is faced with an event that affects and changes their life situation and requires numerous contacts with various actors in the public sector. Customer needs and experience were in focus and survivors were involved during the process.

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.

Baseline: A qualitative study showed that survivors find it difficult to handle practically everything around a death. It is difficult to know what to start and where to turn. It is especially difficult when you have never done it before, are in shock and have impaired cognitive ability,

thus creating stress and uncertainty. The majority want to be able to turn to one place to handle their cases and get answers to their questions.

- Target 1: The website should be a support for society and be perceived as the obvious guide for survivors.
- Target 2: The survivor gets a better service and an increased sense of security through combined and uniform information and communication.
- Key performance indicator: More than 50 per cent of the users think that the overall information provides better guidance and help compared to the status quo.

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.

Since the launch on September 27, 2016, the website has had:

- 427,823 visits;
- 1,095,863 page views;
- 303,477 unique visitors.

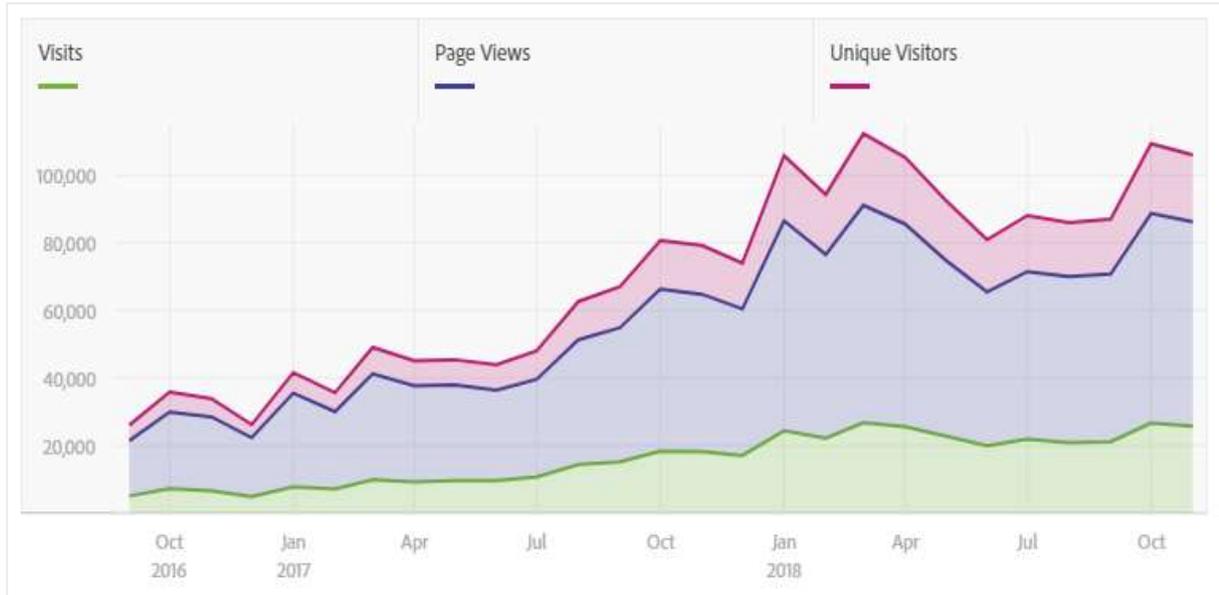
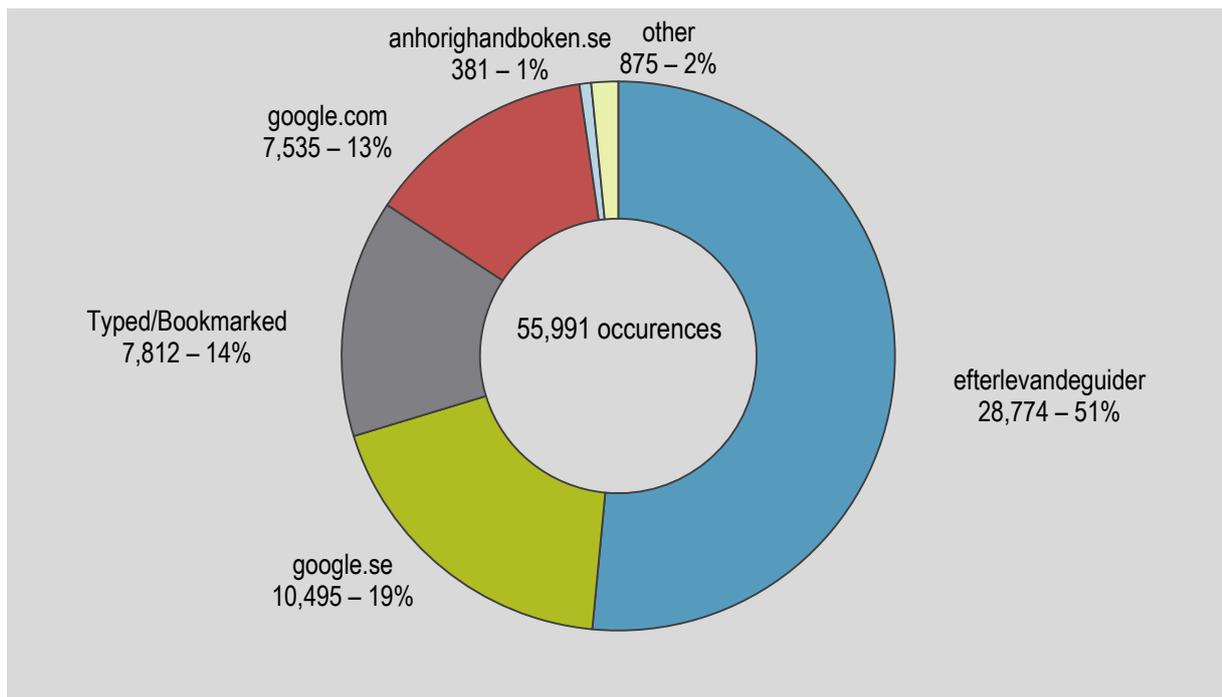
The peaks in 2018 coincide with the website receiving prizes and commendations (Figure 1).

By December 2018, the Guide has become an obvious entry to get information. The user comes via Google or by knowing that the Guide exists. 14 per cent have bookmarked the Guide, which indicates that it is a regularly-visited website. Few users come to the Guide via the authorities' and municipalities' websites (Figure 2):

- 14 per cent of those who contact the Guide have personal questions. It can be a sign that more is expected from the Guide;
- 50 per cent type the URL;
- 18 per cent via Google;
- 14 per cent via browser bookmark.

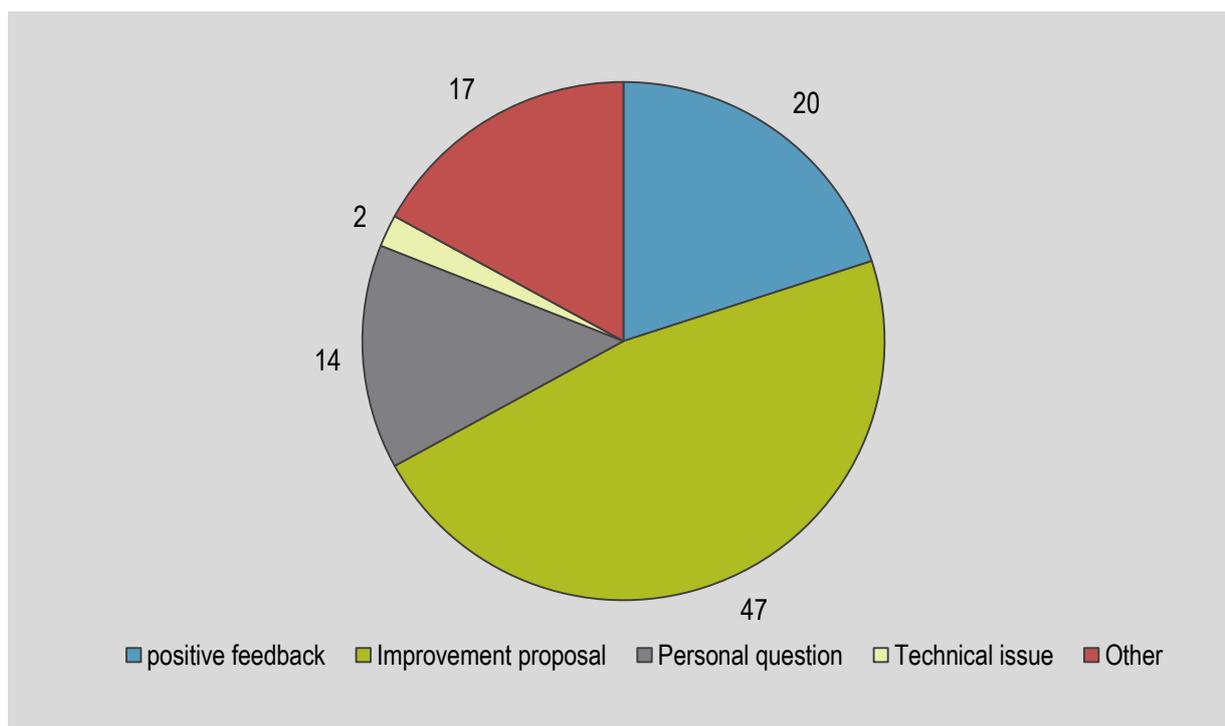
2017 project evaluation:

- 63 per cent of the users experienced that they got very good guidance.
- 54 per cent of the users experienced that they got the answers that they were looking for.
- 75 per cent think that the language is clear and easy to understand.

Figure 1. Website visits, views, unique visitors**Figure 2.** Access modes to the Guide

2017–18 feedback from e-mail forms (Figure 3):

- 47 per cent request improvements (e.g. supplementary information, translation into English, templates for proxies and printed material).
- 20 per cent have positive feedback (e.g. that they have been helped by the Guide, easy to find, and good that the Guide is available).
- 14 per cent of the messages are about personal issues that we forward or refer to authorities.

Figure 3. 2017–18 feedback from email forms (percentage)

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.

Factors indispensable to replicate the good practice:

- User and partner involvement – The Swedish Tax Agency, the Swedish Social Insurance Agency, and the Swedish Pensions Agency are the three government agencies that have jointly collaborated and developed the Guide. They are responsible for ensuring that the information is correct and neutral. Survivors, survivors' organizations, funeral agencies, Insurance Sweden, and many more have been involved.
- To ensure that the site meets the needs and becomes a support and obvious guide, we designed it for people who are in shock, in grief and in need of an empathetic and simple response when they are facing one of life's most difficult times.
- Replicability – Developing the Guide resulted in a reusable method and model for the development of life-events-based customer interaction, and describes the responsibilities of the lead agency regarding project implementation and impact monitoring.
- Governance – The choice of the lead agency may vary depending on the stages of the development. However, unless otherwise agreed, the lead agency is responsible for running the entire development phase, i.e., until the expected benefits of the phase have been achieved. The lead has overall responsibility for that development phase and should appoint a steering committee consisting of representatives of the respective partners, to lead the development work. Responsibility for business case implementation should be

included in the mandate of the steering committee. A well-composed reference group is important for achieving approval, transparency, participation, etc.

Other success factors:

- Approval at Director-General level.
- Since the development was based on life-events, we listened to the needs of the survivors.
- Joint funding and shared resources with steering group and working group.
- Thanks to the use of cloud services, resource conflicts did not occur with the respective agencies' project portfolio.
- Strong commitment and good cooperation within the project team.