

North East Scotland Pension Fund  
**nespf**

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# **Pension Administration Strategy**

**Quarterly Reporting 30<sup>th</sup> September 2023**

# 1. NESPF performance from 1<sup>st</sup> April to 30<sup>th</sup> September

## 1.1 Key administration tasks

Measuring performance is essential to evidence the efforts made by both the Pension Fund and Scheme employers to comply with statutory requirements and deliver a high-quality pension administration service. The Pension Fund aims to provide the information below within the agreed timescales shown.

Administration Task	Target	Completed cases during reporting period			Additional targets for completed cases during reporting period				Uncompleted cases during reporting period	
		Cases	Achieved	Percentage	+ 5 days	+ 10 days	+ 20 days	> + 20 days	Cases	Revised %
Notification of death in service	5 days	25	22	88.0%	92.0%	92.0%	96.0%	1	1	84.6%
Notification of retirement estimate	10 days	241	239	99.2%	99.2%	99.6%	99.6%	1	5	97.2%
Notification of retirement benefits	10 days	939	863	91.9%	93.5%	96.2%	98.8%	11	4	91.5%
Notification of deferred benefits	10 days	1211	1165	96.2%	97.0%	98.3%	99.1%	11	6	95.7%
Notification of refund	10 days	707	703	99.4%	99.7%	99.9%	99.9%	1	11	97.9%
Notification of transfer in value	10 days	104	68	65.4%	66.3%	69.2%	73.1%	28	2	64.2%
Notification of transfer out value	10 days	275	153	55.6%	56.4%	58.2%	63.6%	100	6	54.4%
		3502	3213	91.7%				153	35	90.8%

**Completed cases during reporting period** - reporting output is based on 5 and 10 day targets built into workflow cases for processing administration tasks as declared in the pension administration strategy:

- The SCAPE rate change announced in March impacted on transfer performance as revised factors were not available until July.

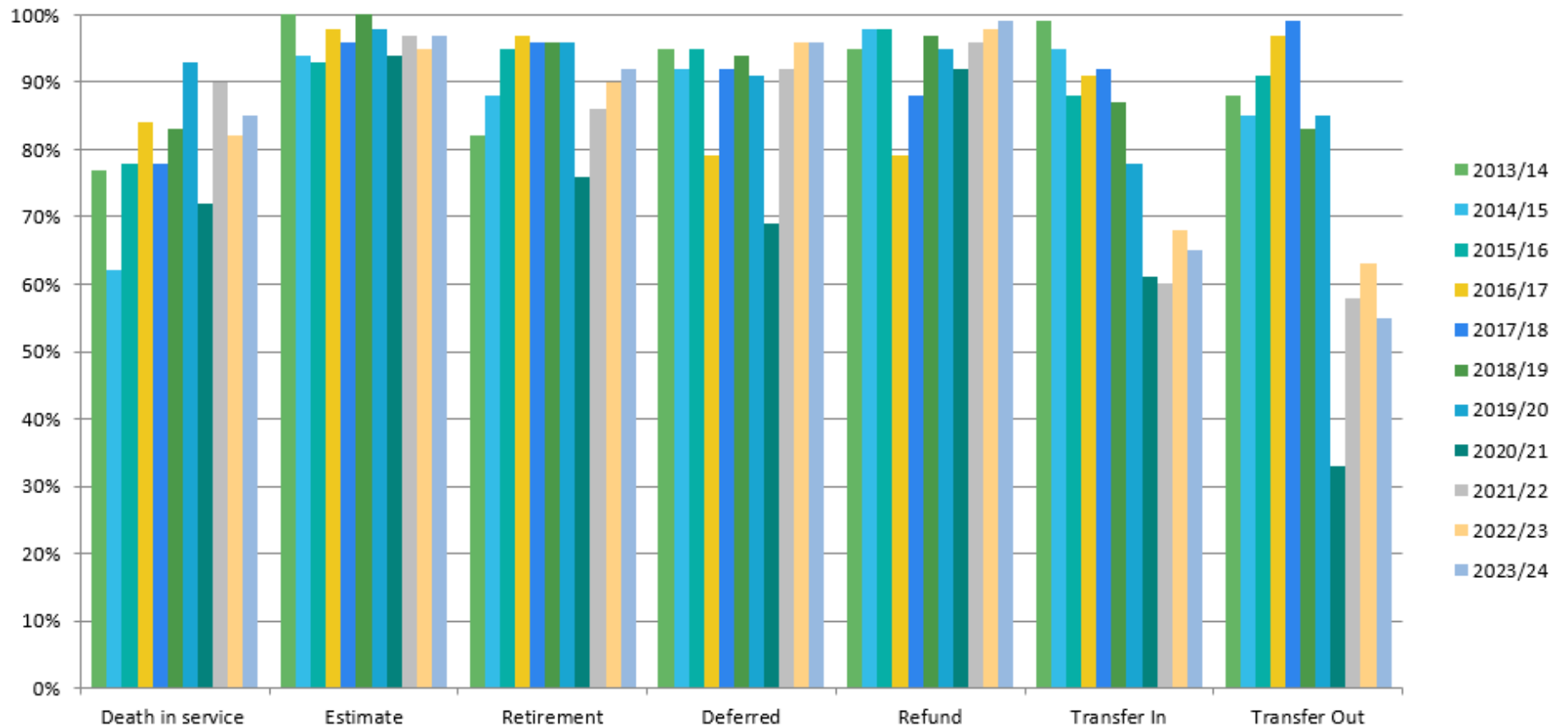
**Additional targets for completed cases during reporting period** - reporting output is based on adding 5/10/20 days to the 5 and 10 day targets built into workflow cases for processing administration tasks:

- Holding back transfers that could not be processed until factors received explains the high numbers taking more than 20 days.

**Uncompleted cases during reporting period** - cases identified that were due to be completed and do not have a Reply Due date set in advance of the end of the reporting period:

- *Uncompleted cases remain lower than previous year with 35 compared to 90 in Q2 2022/23.*

## 1.2 Previous years comparison



## 1.3 McCloud remedy

In December 2018 the Court of Appeal ruled in McCloud v Ministry of Justice that “transitional protection” offered to some members as part of pension reform amounted to unlawful discrimination. In July 2019 following employment tribunal Government stated difference in treatment would be remedied across all public sector schemes.

This dashboard provides an update on progress made to extend protections by recalculating benefits for all eligible members in accordance with the new regulations - recalculations will commence when the final regulations are published.

### Eligible members



*Count of Assumed Benefits* is the total number of eligible members for whom we have calculated the Care benefits that are to be used in the Underpin calculation.

### Provisional guaranteed amounts

McCloud Status	Eligible Members	Provisional Cost	Provisional Members
Active	0	Null	0
Deferred	0	Null	0
Undecided	0	Null	0

This is the provisional future cost of benefits identified during the 1 April 2015 to 31 March 2022 remedy period for members taking their benefits at NPA/Age65.

### Final guaranteed amounts

McCloud Status	Eligible Members	Final Cost	Final Members
Deceased	0	Null	0
Leaver	0	Null	0
Pensioner	0	Null	0
Undecided	0	Null	0

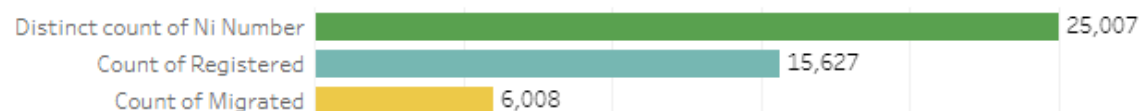
This is the additional cost of benefits identified during the 1 April 2015 to 31 March 2022 remedy period for benefits already paid to members.

3,215 eligible members are ready for the underpin calculations which will commence on 1 December.

## 1.4 Members online

This dashboard shows members that have registered for online self service and those that have migrated to *My Pension+* which went live on 26 June 2023.

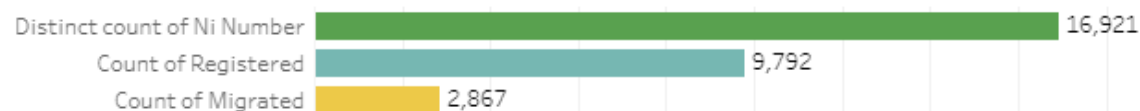
### Actives



### Percentages

Registered members	62.5%
Migrated members	38.4%

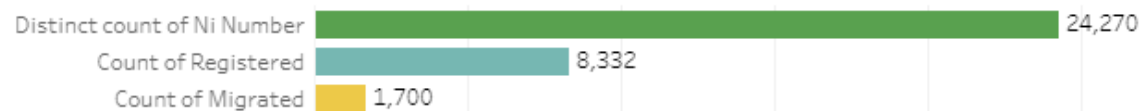
### Deferreds



### Percentages

Registered members	57.9%
Migrated members	29.3%

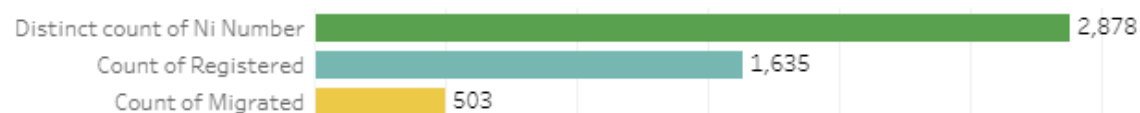
### Pensioners & Dependants



### Percentages

Registered members	34.3%
Migrated members	20.4%

### Undecided Leavers



### Percentages

Registered members	56.8%
Migrated members	30.8%

More than 11,000 members have successfully migrated to *My Pension+*.