



North East Scotland Pension Fund
nespf

Pension Administration Strategy

Quarterly Reporting to 30th September 2024

1. NESPF performance from 1st April to 30th 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.

Measurement and Target	Cases completed	Within target	Percentage achieved	Outwith target	Average days over target	Previous period percentage	Percentage movement
Death In Service notification within 5 working days	18	17	94.4%	1	2.00	100.0%	-5.6%
Death of Deferred/Pensioner notification within 5 working days New	158	153	96.8%	5	12.00	94.4%	2.4%
Deferred Benefit Care Only within 60 days New	418	417	99.8%	1	5.00	100.0%	-0.2%
Deferred Benefit Final Salary within 60 days New	230	225	97.8%	5	16.00	100.0%	-2.2%
Deferred Benefit notification within 10 working days	643	633	98.4%	10	4.30	97.5%	0.9%
Refund within 10 working days	318	313	98.4%	5	8.60	98.4%	0.0%
Retirement Benefit within 10 working days	860	702	81.6%	158	5.51	71.5%	10.1%
Retirement Estimate within 10 working days	213	213	100.0%			100.0%	0.0%
Transfer In quotation within 10 working days	16	13	81.3%	3	26.67	84.6%	-3.4%
Transfer Out quotation within 10 working days	136	106	77.9%	30	28.07	87.8%	-9.9%
Totals	3010	2792	92.8%			88.3%	4.5%

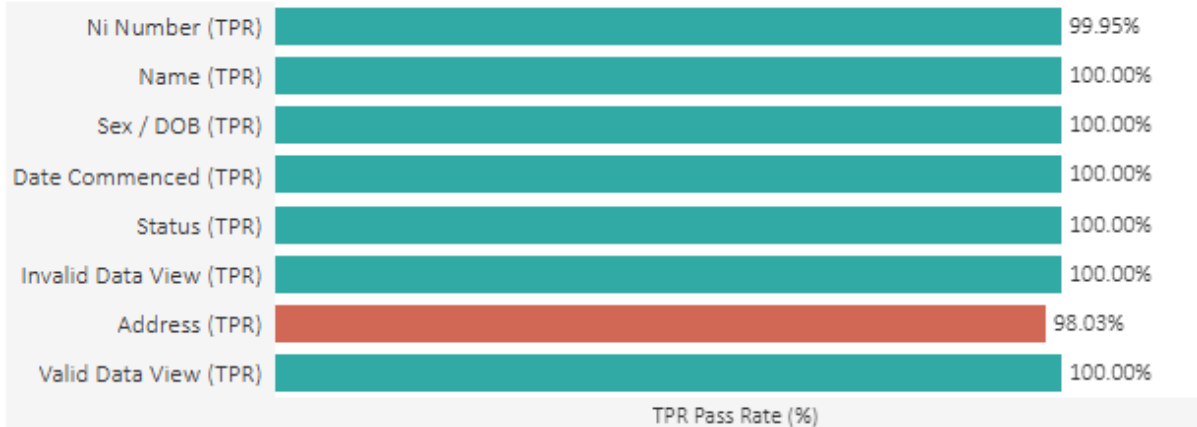
Percentage Analysis

- Overall percentage achieved at 92.8% is up 4.5% on previous quarter and above the 90.5% achieved for 2023/24.

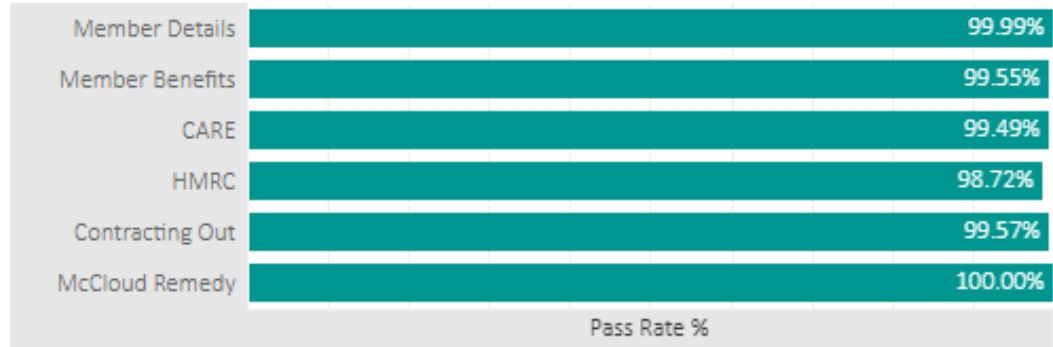
1.2 Data quality

The Pension Regulator (TPR) requires Common and Scheme Specific data to be measured and reported annually in October.

Common Data Score = 98.7% (TPR target 100%)



Scheme Specific Data Score = 98.9% (TPR target 100%)



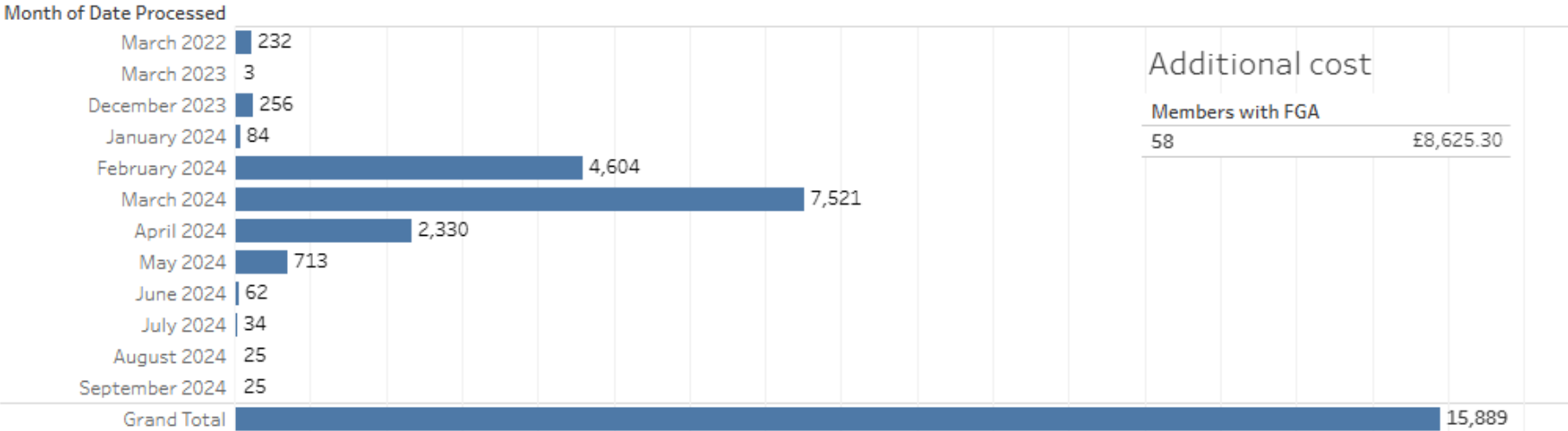
1.3 McCloud remedy

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 Local Government Pension Scheme (Remedial Service) (Scotland) Regulations 2023.

The bar chart below shows the number of calculations completed by the Fund so far, the number of members who qualified for a final guaranteed amount (where member is better off because benefits calculated under Final Salary rules exceed those calculated under Care rules) and the additional cost of all final guaranteed amounts.

Calculations completed



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.

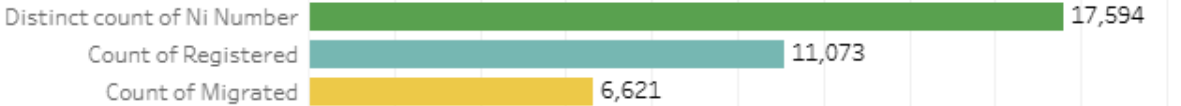
Actives



Percentages

Registered members	66.5%
Migrated members	70.4%

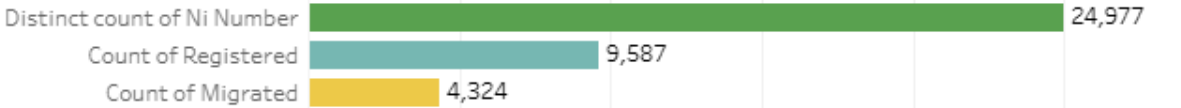
Deferreds



Percentages

Registered members	62.9%
Migrated members	59.8%

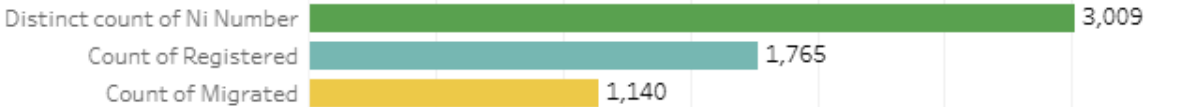
Pensioners & Dependants



Percentages

Registered members	38.4%
Migrated members	45.1%

Undecided Leavers



Percentages

Registered members	58.7%
Migrated members	64.6%