

North East Scotland Pension Fund
nespf

Pension Administration Strategy

Quarterly Reporting 31st March 2023

1. NESPF performance from 1st April to 31st March

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	43	36	83.7%	90.7%	90.7%	93.2%	3	1	81.8%
Notification of retirement estimate	10 days	491	480	97.8%	98.2%	99.0%	100.0%		16	94.7%
Notification of retirement benefits	10 days	1999	1903	95.2%	97.1%	98.5%	99.3%	13	127	89.5%
Notification of deferred benefits	10 days	1889	1842	97.5%	98.3%	98.5%	98.5%	29	22	96.4%
Notification of refund	10 days	1375	1351	98.3%	99.2%	99.6%	99.7%	4	11	97.5%
Notification of transfer in value	10 days	107	88	82.2%	85.0%	87.9%	90.7%	10	22	68.2%
Notification of transfer out value	10 days	434	277	63.8%	72.6%	78.8%	82.9%	74	6	63.0%
		6338	5977	94.3%				133	205	91.3%

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:

- Overall revised percentage remained above 90% for each quarter and increased by 3% for the year compared with 2021/22.

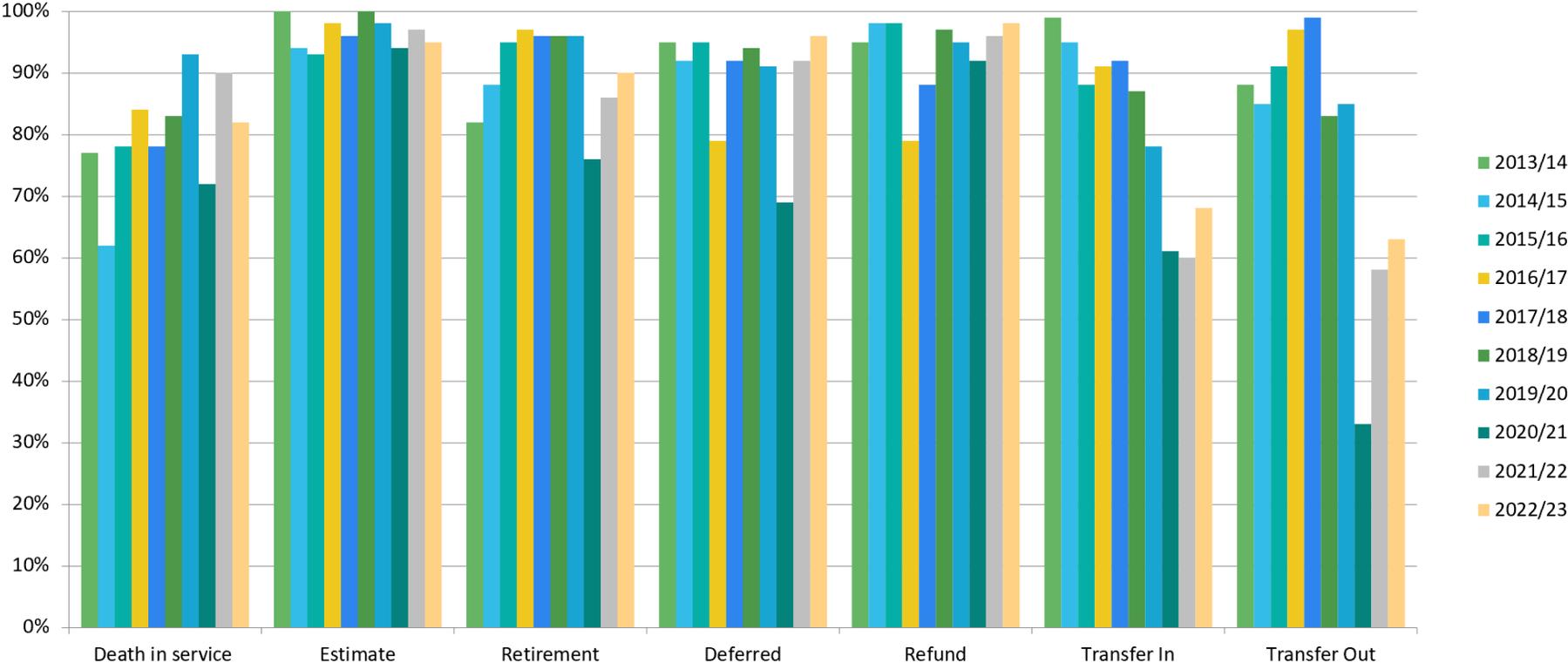
Additional targets for completed cases during reporting period - reporting output is based on adding 5/10/20 days to the 5 and 10 day targets built into workflow cases for processing administration tasks:

- Cases more than 20 days over target reduced by 66 for the year compared with 2021/22.

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 reduced by 38 for the year compared with 2021/22.*

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 Date Ready is the total number of eligible members ready for the revised calculation and *Count of Date Processed* is the total number of eligible members processed by the revised 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.

Members by employer that are ready for recalculation

Location/Employer	
00007: Aberdeen Endowments Trust	2
00009: North East Sensory Services	22
00011: Fraserburgh Harbour	1
00013: Peterhead Port Authority	5
00018: Robert Gordon's College	50
00019: Aberdeen Cyrenians	11
00023: Mental Health Aberdeen	9
00028: Fersands and Fountain	2
00034: Save Cash and Reduce Fuel	14
00036: Inspire	61
00040: Archway	16
00047: Sanctuary Scotland	18
00062: St Machar Parent Support Proj	3
00066: Printfield Community Project	2
00067: Home Start Aberdeen	2
00071: Aberdeen Foyer	30
00078: Pathways	2
00079: Outdoor Access Trust Scotland	3
00080: Osprey Housing	12
00081: Aberdeen Performing Arts	35
00084: NESTRANS	9
00086: Aberdeen Heat and Power	3
00087: Station House Media Unit	1
00094: Forth and Oban	10
00095: Alcohol and Drugs Action	1

Location/Employer	
00107: idverde	4
00109: Xerox UK Ltd	9
00111: Forth and Oban (Shire)	2
00300: Scottish Fire and Rescue Serv	58
00701: Insured First Aberdeen	41
00702: Insured First Glasgow (Legacy)	120
00801: First Aberdeen	37
00802: First Glasgow (Legacy)	55