



North East Scotland Pension Fund
nespf

Pension Administration Strategy

Quarterly Reporting 30th June 2023

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

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	19	17	89.5%	89.5%	94.7%	94.7%	1	1	85.0%
Notification of retirement estimate	10 days	99	97	98.0%	98.0%	99.0%	99.0%	1	5	93.3%
Notification of retirement benefits	10 days	455	416	91.4%	93.2%	96.0%	98.0%	9	4	90.6%
Notification of deferred benefits	10 days	770	755	98.1%	98,1%	98,7%	98,8%	9	5	97.4%
Notification of refund	10 days	397	395	99.5%	99.7%	100.0%				99.5%
Notification of transfer in value	10 days	13	10	76.9%	76.9%	84.6%	100.0%		2	66.7%
Notification of transfer out value	10 days	62	46	74.2%	74.2%	79.0%	83.9%	10	5	68.7%
		1815	1736	95.6%				30	22	94.5%

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 percentages remain above 90%.

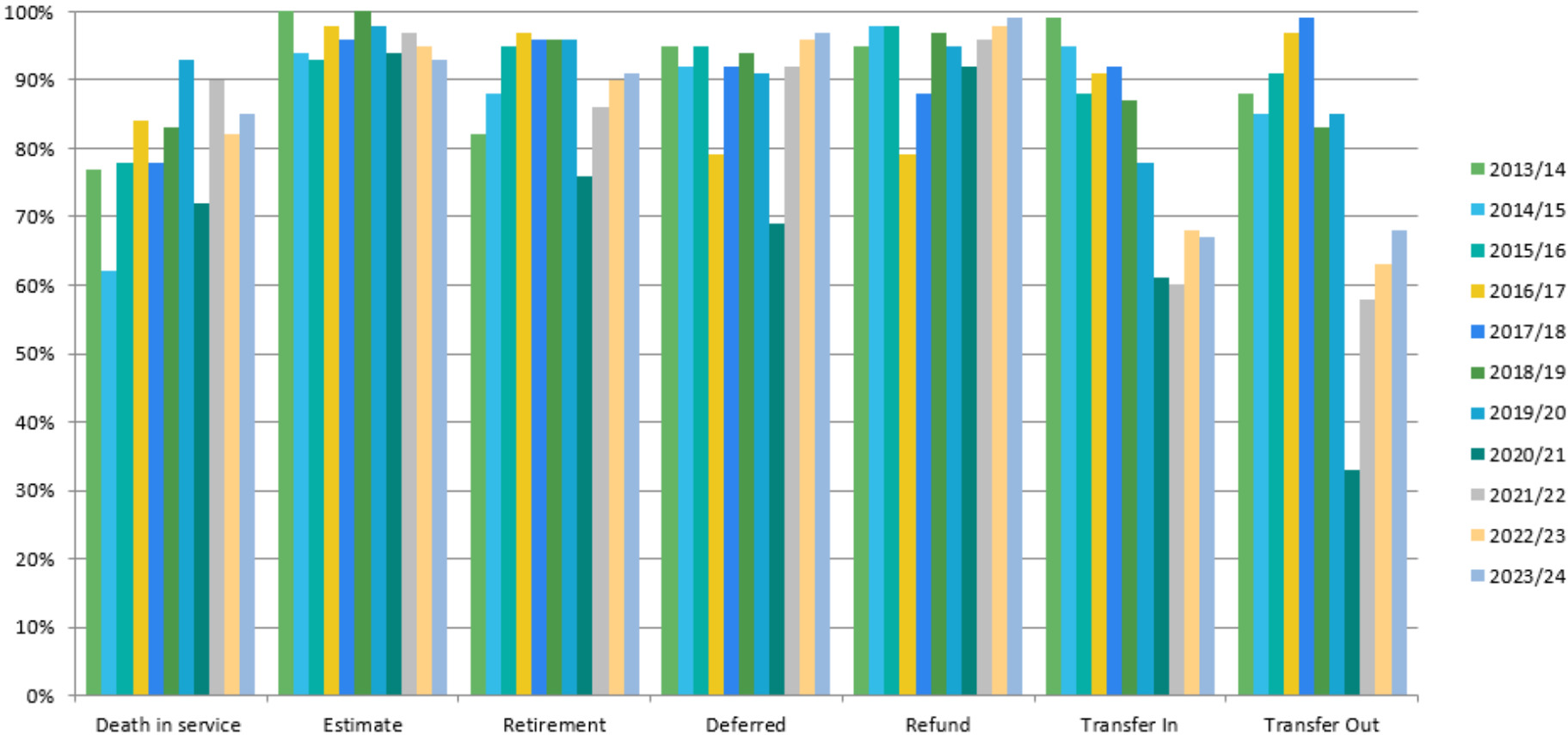
Additional targets for completed cases during reporting period - reporting output is based on adding 5/10/20 days to the 5 and 10 day targets built into workflow cases for processing administration tasks:

- Cases more than 20 days over target reduced by 13 compared with Q1 2022/23.

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 14 compared with Q1 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 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

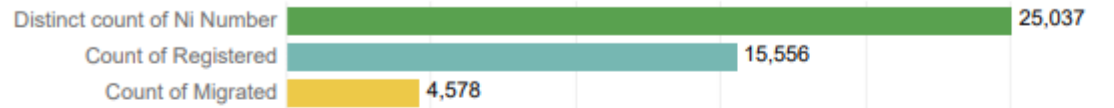
McCloud Status	Eligible Members	Final Cost	Final Members
Deceased	0	Null	0
Leaver	0	Null	0
Pensioner	0	Null	0
Undecided	0	Null	0

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.

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, it also displays the amount of activation key requests received since going live.

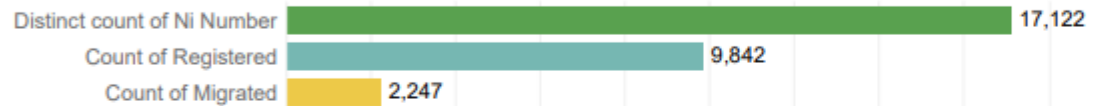
Actives



Percentages

Registered members	62.1%
Migrated members	29.4%

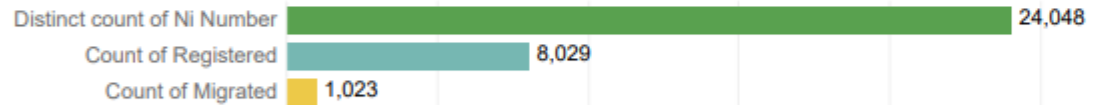
Deferreds



Percentages

Registered members	57.5%
Migrated members	22.8%

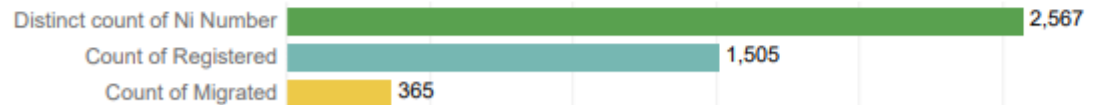
Pensioners & Dependants



Percentages

Registered members	33.4%
Migrated members	12.7%

Undecided Leavers



Percentages

Registered members	58.6%
Migrated members	24.3%

Activation Key requests

