



North East Scotland Pension Fund  
**nespf**

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# **Pension Administration Strategy**

**Quarterly Reporting to 31<sup>st</sup> December 2024**

# 1. NESPF performance from 1<sup>st</sup> April to 31<sup>st</sup> December

## 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	29	28	96.6%	1	2.00	94.4%	2.2%
Death of Deferred/Pensioner notification within 5 working days <span>New</span>	237	230	97.0%	7	14.86	96.8%	0.2%
Deferred Benefit Care Only within 60 days <span>New</span>	596	591	99.2%	5	10.00	99.8%	-0.6%
Deferred Benefit Final Salary within 60 days <span>New</span>	344	331	96.2%	13	16.23	97.8%	-1.6%
Deferred Benefit notification within 10 working days	1,052	1,037	98.6%	15	10.80	98.4%	0.2%
Refund within 10 working days	438	427	97.5%	11	8.82	98.4%	-0.9%
Retirement Benefit within 10 working days	1,254	985	78.5%	269	4.77	81.6%	-3.1%
Retirement Estimate within 10 working days	352	352	100.0%	0	0.00	100.0%	0.0%
Transfer In quotation within 10 working days	39	32	82.1%	7	22.43	81.3%	0.8%
Transfer Out quotation within 10 working days	244	183	75.0%	61	32.03	77.9%	-2.9%
<b>Totals</b>	<b>4585</b>	<b>4196</b>	<b>91.5%</b>			<b>92.8%</b>	<b>-1.3%</b>

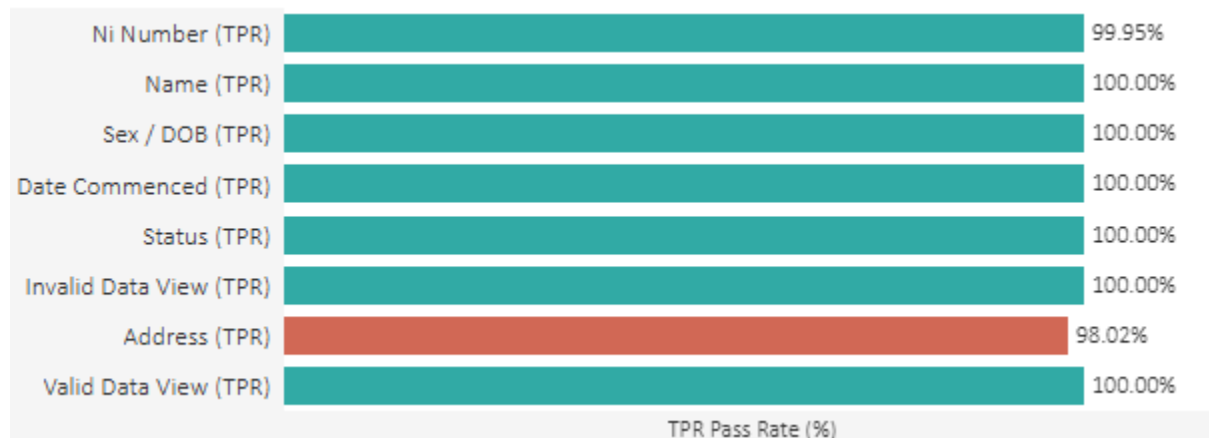
### Percentage Analysis

- Overall percentage achieved at 91.5% is down 1.3% on previous quarter but remains above the 90.5% achieved for 2023/24.

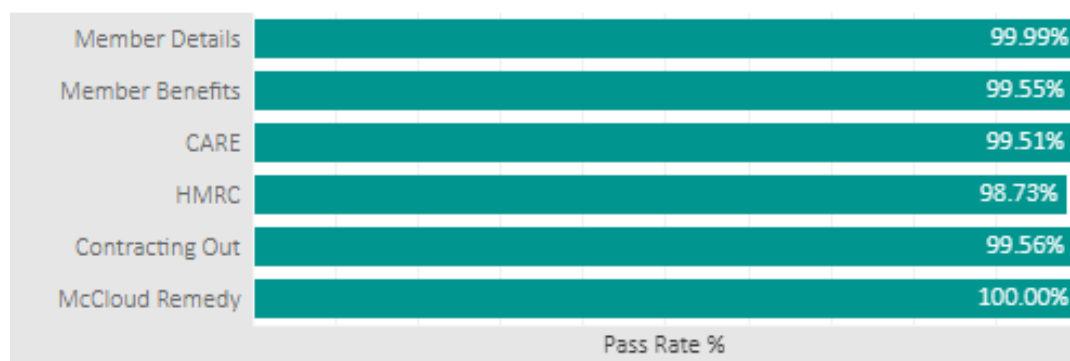
## 1.2 Data quality

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%)**



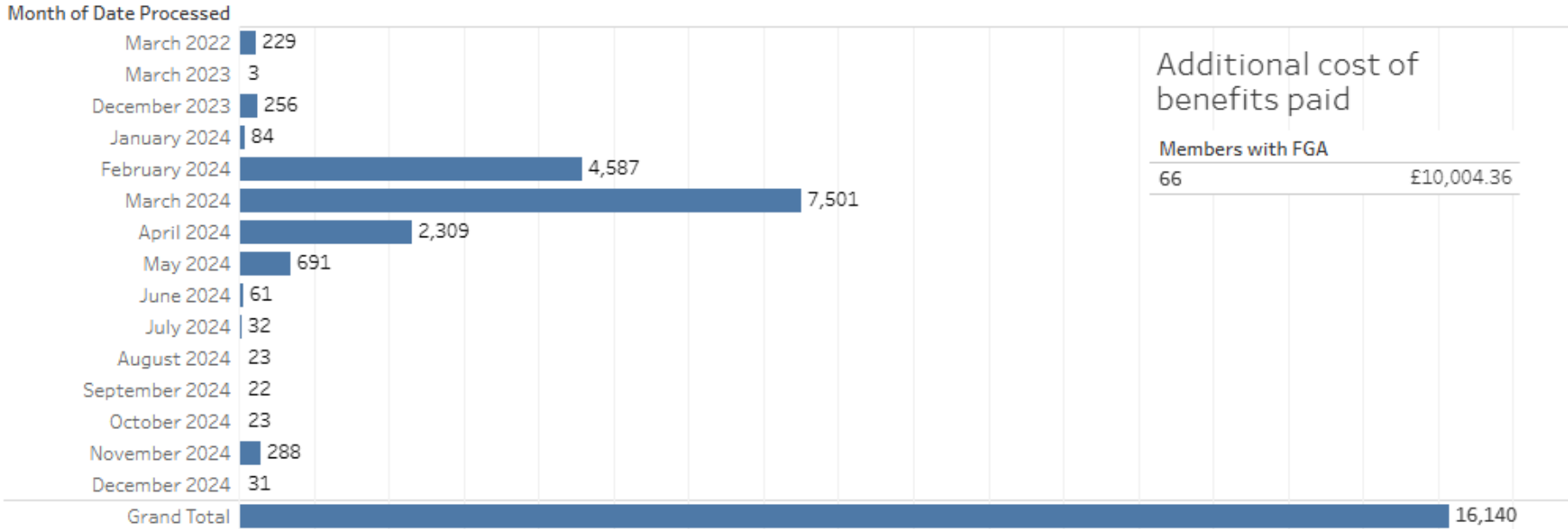
### 1.3 McCloud remedy

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

### My Pension+

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.

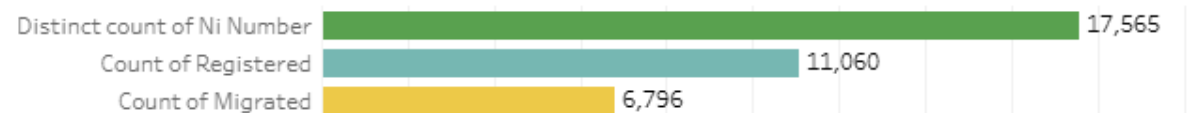
#### Actives



#### Percentages

Registered members	66.5%
Migrated members	72.1%

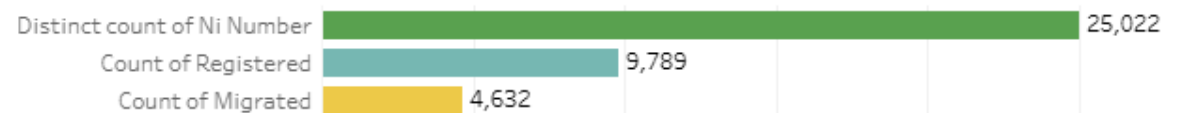
#### Deferreds



#### Percentages

Registered members	63.0%
Migrated members	61.4%

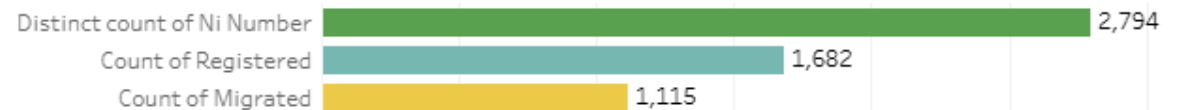
#### Pensioners & Dependants



#### Percentages

Registered members	39.1%
Migrated members	47.3%

#### Undecided Leavers



#### Percentages

Registered members	60.2%
Migrated members	66.3%

## 1.5 Pension dashboards

This dashboard shows current position with data transferred into our ISP Test environment that will be used for onboarding to the governments ecosystem later this year which is a requirement for all public sector pension schemes. The NESPF will be required to provide Pension Data for all active and deferred pensioners within the Fund.

Member Records	Active	Deferred
46,890	26,936	19,954

The 3,000+ members relates to new members who joined the scheme after 31 March 2024 and therefore do not have annual benefits statements attached to their records.

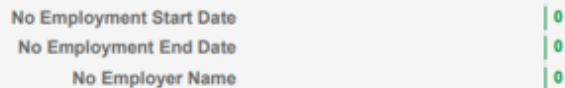
### 3,084 Records Missing Accrued Data 6.58% of Active & Deferred Records



### 3,271 Records Missing ERI Data 12.14% of Active records



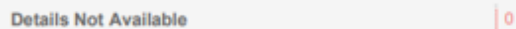
### 0 Records Missing Employer Data 0.00% of Active & Deferred records



### 3,071 Records With old or Null Calculation Date 6.55% of Active & Deferred records



### 0 Records Set to Details Not Available to PDP 0.00% of Active & Deferred records



### 22 Records Have No Benefit Calculations 0.05% of Active & Deferred records

