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# **Pension Administration Strategy**

**Quarterly Reporting to 31<sup>st</sup> March 2025**

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

| 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                             | 36              | 34            | 94.4%               | 2              | 1.50                     | 96.6%                      | -2.2%               |
| Death of Deferred/Pensioner notification within 5 working days <span>New</span> | 369             | 319           | 86.4%               | 50             | 8.54                     | 97.0%                      | -10.6%              |
| Deferred Benefit Care Only within 60 days <span>New</span>                      | 951             | 942           | 99.1%               | 9              | 13.78                    | 99.2%                      | -0.1%               |
| Deferred Benefit Final Salary within 60 days <span>New</span>                   | 515             | 488           | 94.8%               | 27             | 23.18                    | 96.2%                      | -1.4%               |
| Deferred Benefit notification within 10 working days                            | 1,416           | 1,389         | 98.1%               | 27             | 9.37                     | 98.6%                      | -0.5%               |
| Refund within 10 working days   | 581             | 559           | 96.2%               | 22             | 10.09                    | 97.5%                      | -1.3%               |
| Retirement Benefit within 10 working days                                       | 1,625           | 1,315         | 80.9%               | 310            | 4.90                     | 78.5%                      | 2.4%                |
| Retirement Estimate within 10 working days                                      | 480             | 480           | 100.0%              | 0              |                          | 100.0%                     | 0.0%                |
| Transfer In quotation within 10 working days                                    | 58              | 49            | 84.5%               | 9              | 25.78                    | 82.1%                      | 2.4%                |
| Transfer Out quotation within 10 working days                                   | 324             | 255           | 78.7%               | 69             | 31.07                    | 75.0%                      | 3.7%                |
| <b>Totals</b>   | <b>6,355</b>    | <b>5,830</b>  | <b>91.7%</b>        |                |                          | <b>91.5%</b>               | <b>0.2%</b>         |

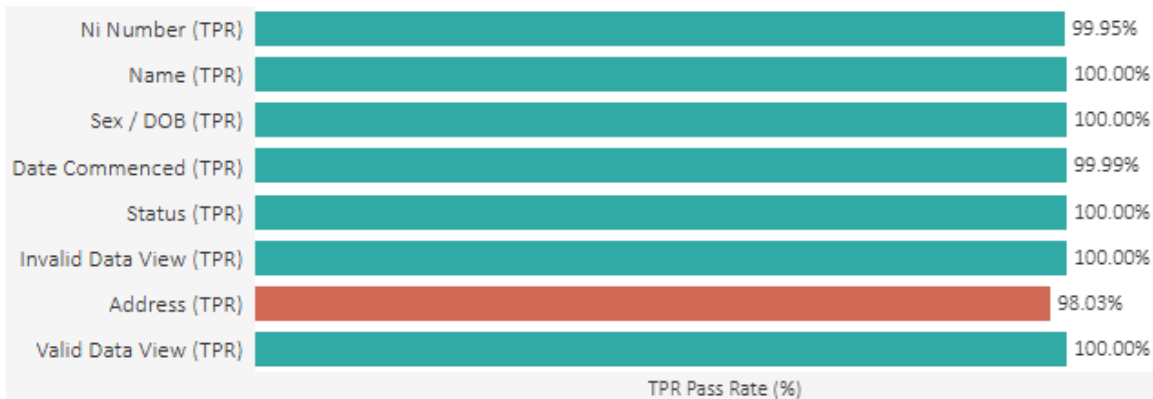
### Percentage Analysis

- Overall percentage achieved at 91.7% is up 0.2% on previous quarter
- Overall percentage achieved for 2024/25 is up 1.2% on previous year.

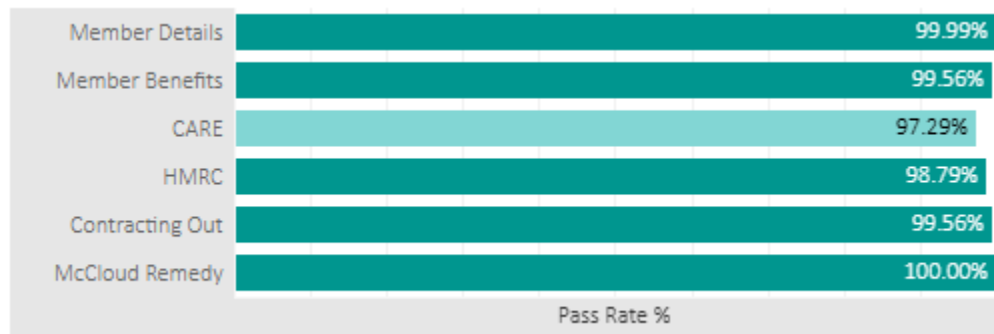
## 1.2 Data quality

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 = 98.4% (TPR target 100%)**

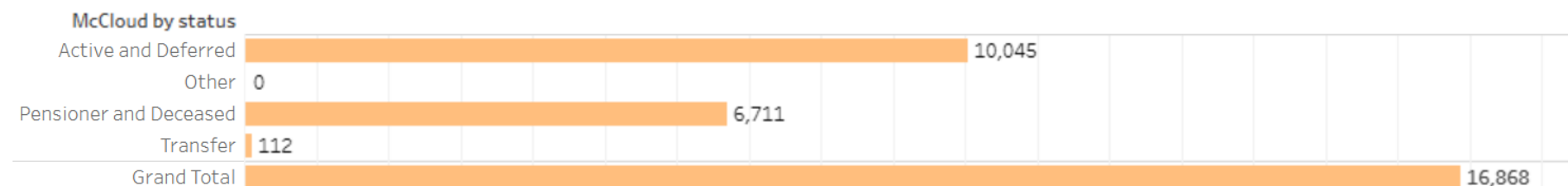


## 1.3 McCloud remedy

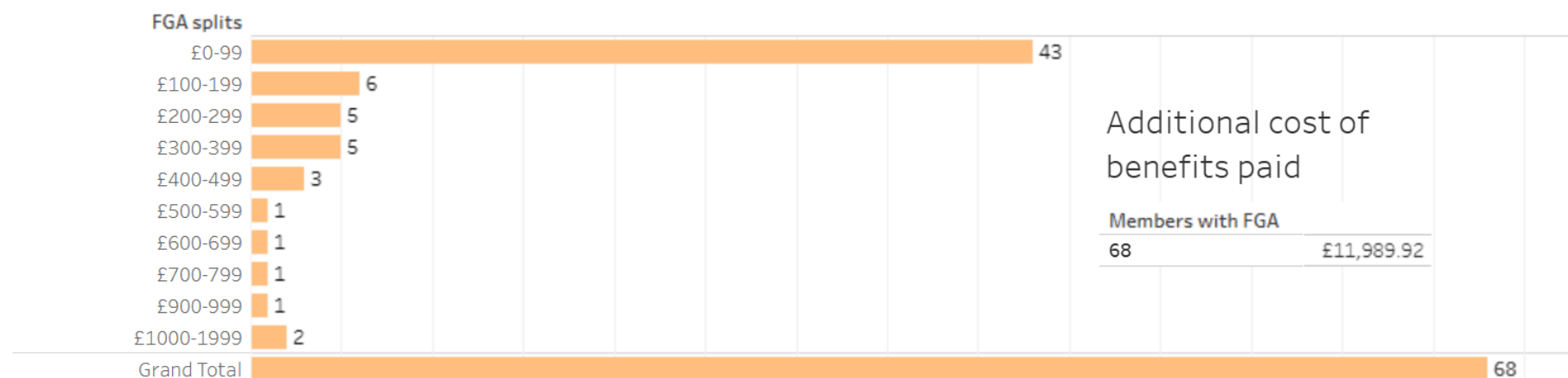
In December 2018 the Court of Appeal ruled in *McCloud v Ministry of Justice* that "transitional protection" offered to some members as part of pension reform amounted to unlawful discrimination. In July 2019 following employment tribunal Government stated difference in treatment would be remedied across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

This dashboard provides results of extending protections by recalculating benefits for all eligible members in accordance with The Local Government Pension Scheme (Remedial Service) (Scotland) Regulations 2023.

### Recalculations



### Cost Analysis

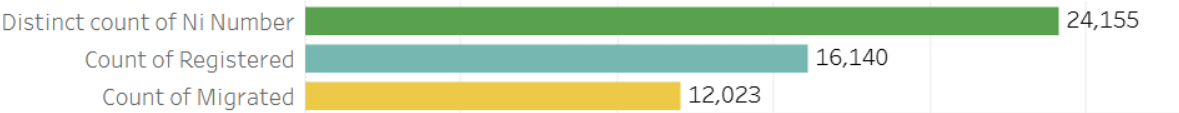


# 1.4 Members online

## 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.

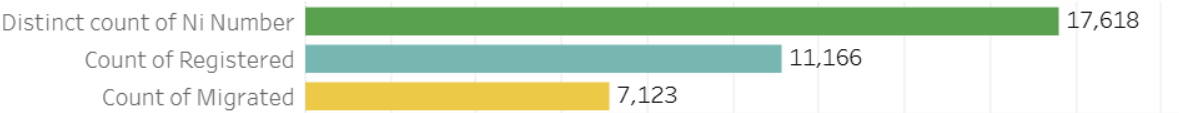
### Actives



### Percentages

|                    |       |
|--------------------|-------|
| Registered members | 66.8% |
| Migrated members   | 74.5% |

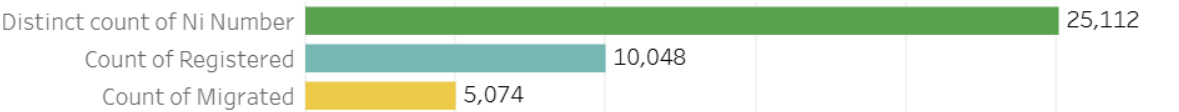
### Deferreds



### Percentages

|                    |       |
|--------------------|-------|
| Registered members | 63.4% |
| Migrated members   | 63.8% |

### Pensioners & Dependants



### Percentages

|                    |       |
|--------------------|-------|
| Registered members | 40.0% |
| Migrated members   | 50.5% |

### Undecided Leavers



### Percentages

|                    |       |
|--------------------|-------|
| Registered members | 63.1% |
| Migrated members   | 69.8% |

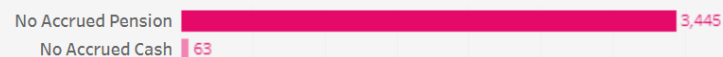
## 1.5 Pension dashboards

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 |
|----------------|--------|----------|
| 46,693         | 26,708 | 19,985   |

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

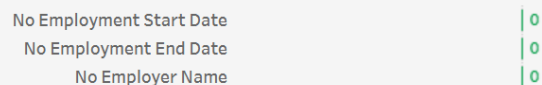
### 3,461 Records Missing Accrued Data 7.41% of Active & Deferred Records



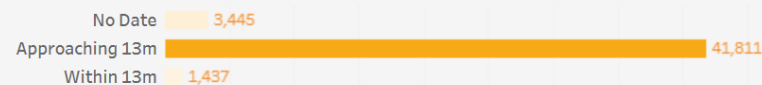
### 3,644 Records Missing ERI Data 13.64% of Active records



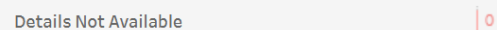
### 0 Records Missing Employer Data 0.00% of Active & Deferred records



### 3,445 Records With old or Null Calculation Date 7.38% of Active & Deferred records



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



### 2 Records Have No Benefit Calculations 0.01% of Active & Deferred records

