



Pension Administration Strategy

Quarterly Reporting to 30 June 2025

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.

Measurement and Target	Cases completed	Within target	Percentage achieved	Outwith target	Average days over target	Previous Quarter percentage	Percentage movement
Death In Service notification within 5 working days	7	7	100.0%	0	0	85.7%	14.3%
Death of Deferred/Pensioner notification within 5 working days	91	88	96.7%	3	27	67.7%	29.0%
Deferred Benefit Care Only within 2 months	362	346	95.6%	16	19	97.6%	-2.0%
Deferred Benefit Final Salary within 2 months	174	158	90.8%	16	21	88.7%	2.1%
Deferred Benefit notification within 10 working days	478	478	100.0%	0	0	96.7%	3.3%
Refund within 10 working days	120	105	87.5%	15	3	91.4%	-3.9%
Retirement Benefit within 10 working days	412	292	70.9%	120	7	88.9%	-18.0%
Retirement Estimate within 10 working days	73	73	100.0%	0	0	100.0%	0.0%
Transfer In quotation within 10 working days	47	38	80.9%	9	31	89.5%	-8.6%
Transfer Out quotation within 10 working days	25	24	96.0%	1	7	81.4%	14.6%
Totals	1789	1609	89.9%			91.7%	-1.8%

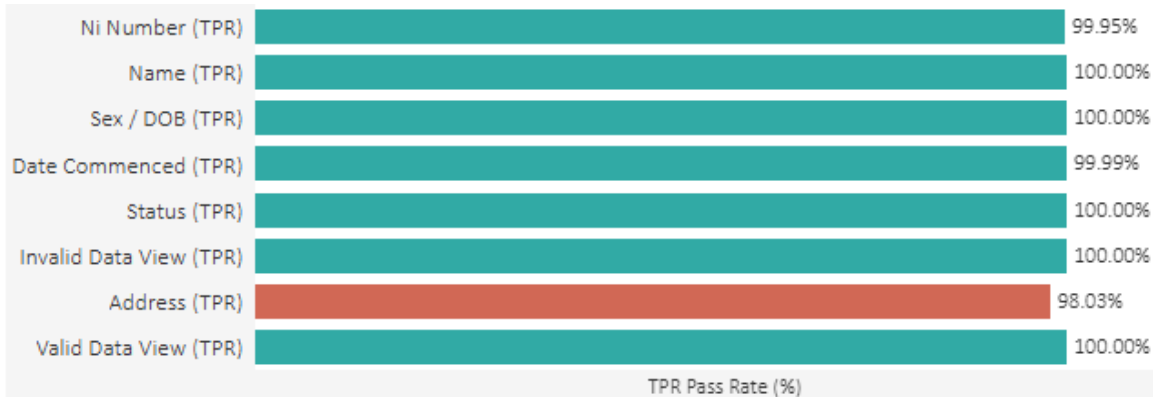
Percentage Analysis

- Overall “Percentage Achieved” at 89.9% is down 1.8% on previous quarter.
- Biggest detractors were “Retirement Benefits within 10 working days” and “Transfer In Quotations within 10 working days”.
- 18% decrease for Retirement Benefits was caused by the need to manually calculate a large number of retirals due to a change in processing pre Pensions Increase retirals that was not reflected by the system. This resulted in longer processing times and had a knock on effect on available resources to complete other benefit administration tasks..
- Transfer Out’s continue to improve following changes to Workflow process.

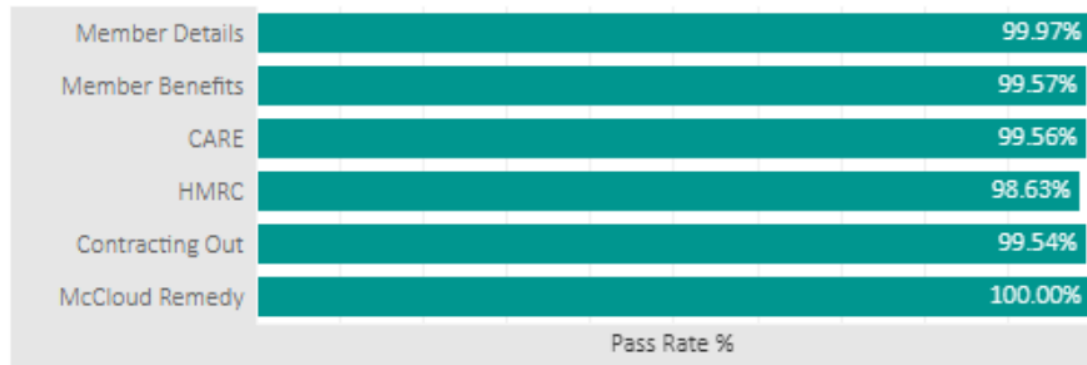
1.2 Data quality

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

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



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

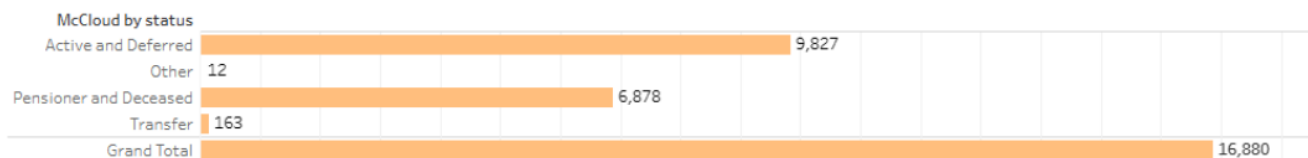


1.3 McCloud remedy

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 the 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 (Remediable 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	67.6%
Migrated members	77.0%

Deferreds



Percentages

Registered members	64.4%
Migrated members	66.3%

Pensioners & Dependants



Percentages

Registered members	41.2%
Migrated members	54.5%

Undecided Leavers



Percentages

Registered members	64.7%
Migrated members	72.9%

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
46,254	26,379	19,875

The 900+ members relates to new members who joined the scheme after 31 March 2025 and therefore do not have annual benefits statements attached to their records.

986 Records Missing Accrued Data

2.13% of Active & Deferred Records

No Accrued Pension 980
No Accrued Cash 6

999 Records Missing ERI Data

3.79% of Active records

No ERI Pension 997
No ERI Cash 3

1 Records Missing Employer Data

0.01% of Active & Deferred records

No Employment Start Date 1
No Employment End Date 0
No Employer Name 0

1,017 Records With old or Null Calculation Date

2.20% of Active & Deferred records

No Date 980
Older than 13m 37
Within 13m 45,237

0 Records Set to Details Not Available to PDP

0.00% of Active & Deferred records

Details Not Available 0

45 Records Have No Benefit Calculations

0.10% of Active & Deferred records

No Ben Calcs 45