

**Report to:** Pension Board  
**Date of meeting:** 11 September 2024  
**By:** Chief Finance Officer  
**Title:** Pension Administration - updates  
**Purpose:** To provide an update to the Pension Board on matters relating to Pensions Administration activities.

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## RECOMMENDATION

The Board is recommended to note the updates and make any comments for feedback to the Pension Committee.

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### 1. Background

1.1 The in-house Pensions Administration Team (PAT) carries out the operational, day-to-day tasks on behalf of the members and employers of the East Sussex Pension Fund (the Fund, ESPF) and for the Administering Authority. They also lead on topical administration activities, projects and improvements that may have an impact on members of the Local Government Pension Scheme (LGPS).

### 2. Key Performance Indicators (KPI)

2.1 The Performance Reports for the months of April, May and June 2024 can be found at **Appendix 1 to 3**. The report now includes all tasks performed by the PAT and is reported directly from the Altair Insights system. A summary is included in the table below:

Month	o/s at start	Post received	Post completed	Completed in SLA	% within SLA	Outside SLA	Total o/s at end	Open tasks at end
Apr 24	2,100	1,790	1,828	1,422	77.8%	406	2,042	580
May 24	1,846	2,021	1,755	1,472	83.9%	283	2,082	556
Jun 24	1,905	1,857	1,763	1,531	86.8%	232	1,975	345
Q2, 24		5,668	5,346	4,425	82.8%	921		

The format of the Performance reports has changed in line with the discussion at the Pension Board and Pension Committee meetings in June 2024 where a draft of the new format was presented. To understand the reports held in the appendices the following should be noted

- The number of tasks at the end of month does not match the opening tasks in the following month due to tasks that have been deleted.
- Two new columns will be added to future performance reports to show the average time taken, and the longest time taken in relation to tasks completed outside of the SLA time. These additional details will be included from August 2024.
- Whilst creating the new reports it was discovered some members of the team had not been setting tasks to “reply due” correctly. Where the task is awaiting an external response (e.g. from a member or their adviser who need to say complete a form) the SLA clock should be paused. The team requested Heywood to correct the reply due setting in bulk. 496 tasks were found and corrected. The team have also been shown how to set the radio button correctly when changing tasks to reply due. As a result of this finding and work carried out to resolve and ensure the system is being used correctly in the future the SLA performance could be understated and cases outside of the SLA have not been investigated.

- The PAT saw similar performance numbers during quarter one 2024, average at 82.50% (volume completed 4,651).

Looking forwards the summary July 2024 performance numbers are shown in the table below. July numbers continued to be impacted by the “reply due” radio button issue.

Month	o/s at start	Post received	Post completed	Completed in SLA	% within SLA	Outside SLA	Total o/s at end	Open tasks at end
Jul 24	1,810	2,612	1,984	1,743	87.9%	241	2,404	882

To aid visibility of the work being undertaken by the PAT team **Appendix 4** provides a high-level view of performance achieved (as presented) over a number of years.

2.2 The Fund aims to achieve a gold standard service provision for the Pensions Helpdesk and the results are included in **Appendix 5**. From April 2024 the Helpdesk has been delivered by an in-house team within PAT. Due to the transition into an inhouse team the reportable information relating to service delivery has reduced. The Fund can no longer determine the Call Answer Time or the Abandoned Call Rate. While members can still dial both the Main Helpline and Website Helpline numbers, they now both feed into a single Hunt Group so we can no longer differentiate between the call types. The roll out of the telephony upgrade is awaited.

### 3. Projects update

#### 3.1 Annual Benefit Statements (ABS)- 2024

The table below shows the position relating to the number of ABS produced at the 31 August 2024 statutory deadline. There was a significant improvement on prior years.

Year / Status	No. produced	Success %
2024 Active	23,770	99.24%
2023 Active	22,609	95.90%
2024 Deferred	34,541	99.99%
2023 Deferred	31,808	99.76%

#### 3.2 McCloud remedy

The data collection aspect for the 140 active employers is almost complete and therefore all except BHCC (234 queries with employer) are with Heywood to load into the test system. The data for the 37 non-active employers is being collated on a single spreadsheet for the Heywood validation tool to test in September.

#### 3.3 Member Self Service (MSS)

MSS is a portal used by members to help members keep track of their ESPF pension. Members can view ABS, update personal info, update nomination forms, and use a range of benefit projectors. The portal is being replaced with a version with improved functionality and much more secure. After a successful pilot with ESCC members in June 2024 the new portal was rolled out to all scheme members in July 2024. All members have received a letter or email requesting them to register for the new portal.

#### 3.4 Pensions Dashboards

Officers continue to focus on getting the data ready using a Heywood Altair Insights dashboard report to identify gaps. Heywood are our Integrated Service Provider and a project plan has been created, with a two phase approach penciled in:

Phase 1 – starting in November 2024 for 10 weeks to build and test.

Phase 2 – starting in August 2025 for 5 weeks to implement and onboard.

Onboarding date – all schemes must onboard by 31 October 2026 but the LGPS formal staging date is 31 October 2025. It is not yet known when the pension dashboards will go live to the public.

The project plan, testing matrix and ABS templates for actives, deferreds and Councillors have been prepared.

### 3.5 Overseas Mortality checks

Officers undertake monthly mortality checks via a third party (ITM) for UK based pensioners which alerts the PAT to any unnotified deaths so that they can be processed in a timely manner to avoid overpayments.

ESPF is also obliged to participate in the National Fraud Initiative (NFI) mortality checks which are undertaken biannually for all pensioners.

Officers undertake regular paper exercise for our circa 600 overseas pensioners to check their wellbeing and the most recent exercise commenced in June 2024, with about two-thirds contacted by email and the remainder by post. Overseas pensioners are required to complete a form, appropriately witnessed and returned within a few months.

In late August 2024, chasers we issued to the outstanding 78 members which advised if the completed form is not returned by end of September their pensions will be suspended.

## 4. **Conclusion and reasons for recommendation.**

4.1 The Pension Board is asked to note the report and make any comments for feedback to the Pension Committee.

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