

**Report to:** Pension Board

**Date of meeting:** 12 February 2026

**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 Pension 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 Pension 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. Service Level Agreements (SLA)

2.1 The Performance Reports for the months of October, November and December 2025 can be found at Appendices 1 to 3. Each report 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 |
|--------------|---------------|---------------|----------------|------------------|--------------|-------------|-------------------|-------------------|
| Jul 25       | 1,555         | 2,080         | 2,040          | 1,906            | 93.0%        | 134         | 1,561             | 206               |
| Aug 25       | 1,460         | 1,742         | 1,504          | 1,444            | 96.0%        | 60          | 1,674             | 328               |
| Sep 25       | 1,519         | 2,283         | 1,941          | 1,819            | 93.7%        | 122         | 1,833             | 570               |
| <b>Q3,25</b> |               | <b>6,105</b>  | <b>5,485</b>   | <b>5,169</b>     | <b>94.2%</b> | <b>316</b>  |                   |                   |
|              |               |               |                |                  |              |             |                   |                   |
| Oct 25       | 1,711         | 2,895         | 2,740          | 2,588            | 94.5%        | 152         | 1,827             | 414               |
| Nov 25       | 1,621         | 1,920         | 1,852          | 1,799            | 96.6%        | 63          | 1,664             | 281               |
| Dec 25       | 1,564         | 1,726         | 1,394          | 1,348            | 96.7%        | 46          | 1,871             | 431               |
| <b>Q4,25</b> |               | <b>6,541</b>  | <b>5,986</b>   | <b>5,735</b>     | <b>95.8%</b> | <b>261</b>  |                   |                   |

\*o/s = outstanding

2.2 To aid visibility of the work being undertaken by the PAT team, Appendix 4 provides a high-level view of performance achieved (as previously presented to Pension Board and Pension Committee) over several years. The volume of tasks received being reported has increased – 9,629 in 2022, 15,411 in 2023, 23,898 in 2024 and 26,035 in 2025.

2.3 The Fund aims to achieve a gold standard service provision for the Pensions Helpdesk and the results for October to December 2025 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 in-house team the reportable information relating to service delivery has reduced. The roll out of the

East Sussex County Council (ESCC) telephony upgrade was completed mid-May 2025. As a result, the Helpdesk was expecting access to call centre technology but that has yet to be installed. It is anticipated that call centre technology will be installed in 2026 as an IT&D project manager has now been assigned to this task, so the PAT will again review the format and type of Management Information data available.

### **3. Pension Administration Staffing Update**

3.1 There has been one resignation on the i-Connect team since the last meeting and the Senior Administrator left on 15 January 2026. The PAT is carrying forward 4 vacancies and has a temporary vacancy due to maternity leave. Officers are looking to restructure the Projects Team to better integrate the i-Connect Team which will result in 2 vacancies being advertised shortly. The PAT performance has much improved and Officers are closely monitoring how the team copes carrying the remaining vacancies.

### **4. Projects update**

#### McCloud remedy

4.1 The PAT are finalising the review of the remaining errors and issue outstanding Annual Benefit Statements. This quarter officers will begin on the non-active member re-calculations where the McCloud underpin applied, ahead of the 31 August 2026 deadline.

4.2 The Heywood Altair system 25.4 quarterly upgrade implemented further McCloud calculation functionality including concurrent transfers-in with service breaks, divorce quotes and actuals and non-Club transfer-out quotations. Once fully tested these processes can stop using the temporary manual calculation spreadsheets.

#### Pension Dashboards

4.3 Onboarding was completed on 24 September 2025 ahead of the deadline of 31 October 2025, but it is not yet known when the pension dashboards will go live to the public. The pensions website has been updated to let employers and members know. [Connection to Pension Dashboard | East Sussex Pension Fund](#)

4.4 The Heywood Altair system 26.1 quarterly upgrade due in February 2026 should resolve the few remaining Additional Voluntary Contribution (AVC) data screen issues which will allow the monthly annual data to be submitted to the Integrated Service Provider (ISP) via a single source.

#### i-Connect onboarding

4.5 We are making good progress on the remaining five historical employers yet to on-board. Bexhill 6<sup>th</sup> Form College should be completed this month. We are concerned that resourcing is an issue and are looking to reshape the team structure.

#### Digital Assistant (chatbot)

4.6 The Digital Assistant is a Chatbot designed to sit on the ESPF website and answer frequently asked questions (FAQ). Officers are working with an external provider ICS.AI who created a draft set of 298 questions and answers. A comprehensive review of the FAQ and prescribed answers have been finalised in June 2025, and 260 questions remain. The final stage of user acceptance testing (involving some Pension Board members) closed on 19 January 2026, subject to the findings, it is anticipated the Chatbot will be live by the end of March 2026.

#### Mortality and Address Tracing

4.7 Further to the proposal by Officers that was set out in an exempt report at agenda item 18

of the Pension Board meeting that took place on 4 November 2025, the contract with ITM Limited expired on 3 January 2026 and was allowed to lapse, with appropriate notice given. The new Heywood monthly Data Cleansing and Enrichment (deferred members) and monthly Mortality service (pensioner members) will commence in April 2026 subject to contract variation approval.

## **5 Conclusion and reasons for recommendation**

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

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**Chief Finance Officer**

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