

Report to: Pension Committee

Date of meeting: 26 February 2026

By: Chief Finance Officer

Title: Pension Administration - updates

Purpose: To provide an update to the Pension Committee on matters relating to Pension Administration activities.

RECOMMENDATION:

The Pension Committee is recommended to note the update.

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
Q3,25		6,105	5,485	5,169	94.2%	316		
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
Q4,25		6,541	5,986	5,735	95.8%	261		

*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. The structure of the Projects Team is being reviewed to better integrate the i-Connect Team. Whilst the PAT performance has much improved, oversight will continue to monitor the impact of the current level of 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 will see focus 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 6th 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 set out in an exempt report at agenda item 19 of the Pension Committee meeting that took place on 18 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 Committee is recommended to note the report.

IAN GUTSELL
Chief Finance Officer

Contact Officer: Paul Punter, Head of Pensions Administration
Email: paul.punter@eastsussex.gov.uk