

APPENDIX 1

PENSION ADMINISTRATION PERFORMANCE 2023/24

In accordance with the Pension Administration Strategy, approved 4 March 2024, the following performance measures have been compared against the targets set within the said strategy document.

Employer Performance Measures

Service Standards

Standard – target completion 90%	Volume	%age Met
New starts notification – within 20 working days	802	98.63%
Change notification – within 20 days	930	100%
Retirement info – at least 20 working days before	385	96.40%
Early leaver notification – within 20 working days	523	100%
Death in service notification – within 10 working days	2	100%

Contribution Payments

The following tables compare the date contribution payments are received against the target date, of 19th of the month, for each of the Scheduled and Active Admitted Bodies.

Employer Body	By Target Date	Late	% On Time
Scottish Borders Council	12	-	100%
Borders College	12	-	100%
Scottish Borders Housing Association	12	-	100%
Jedburgh Leisure Facilities Trust	9	3	75%
Borders Sport and Leisure Trust	12	-	100%
AMEY Community Limited	12	-	100%
CGI	12	-	100%
South of Scotland Enterprise	13	-	100%

There were three late payment during the year, two of these payments were received within three banking days of the required date The other month was in excess of one month late. Conversations have taken place with the employer to remind them of the requirement to ensure payment is received by the due date and a follow up letter issued. We will continue to monitor this employer going forward and take appropriate action should this occur again in the future.

Administering Authority Performance Measures

Service Standards

Standard	Volume	Target	%age Met
Estimates – Transfer In	258	20 days	80%
Estimates – Transfer Out	146	20 days	74%
Estimate – All Other	1,345	10 days	

With the continuation of hybrid working staff it was accepted that it was not going to be possible to record all queries received as in previous years. We also saw a further shift to

queries coming through in a digital manner via email and Members Self Service, which is reflected in the table below.

Type of Query	Volume	Target	%age Met
Phone Calls – logged	94	5 days	100%
Phone Calls to team	3,174	Not measured	
Emails to pensions@scotborders.gov.uk mailbox	8,237	Not measured	
Emails to team members directly	4,035	Not measured	
Correspondence via Altair	3,725	Not measured	
Correspondence via Members Self Service	2,066	Not measured	
Total	21,331		

Other Measures

Area	Measure	Completed
Employer Liaison Meetings	1 per annum	21 st March 2024
Benefit Statements	by end of August	Issued by 25 th August 2023

The ninth liaison meeting, held virtually, with all Admitted and Scheduled Bodies was held during 2023/24 and afforded the employers the chance to ask questions to the Pensions Team. Going forward we will continue to hold the liaison meeting towards the end of the financial year where we will discuss up-coming legislative changes and requirements for the year end processing.

The Annual Benefit Statements for Active and Deferred were loaded into the Member Self Service (MSS) portal. Communications were issued via the scheme employers to alert scheme members that this was now available. All Deferred Members have been invited to sign up for MSS and were advised that they will be published online going forward. There have been regular reminders issued to those not yet signed up and requests made via employers to encourage their scheme members to sign up, this will be an ongoing exercise.

Key Administration Tasks

Task	Total received
New entrants	749
Early leavers	523
Retirements	385
Deaths in service	2
Deaths in deferment	6
Deaths in retirement	131
New Widows(ers), Child Pensions	44
Estimates	1,345
Pension credit members	0
Pay all Pensioners on 15 th of the month or prior working day when 15 th is a non-banking day	100% achieved

Member Self Service Statistics

Task	Total Active	Target	% Completed in target
Active Members	4,836	100%	30.13%
Deferred Members	3,195	100%	
Benefit calculations run	22,569		