

## APPENDIX 1

### PENSION ADMINISTRATION PERFORMANCE 2021/22

In accordance with the Pension Administration Strategy, approved 14 December 2021, 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	905	99.45%
Change notification – within 20 days	872	100%
Retirement info – at least 20 working days before	289	100%
Early leaver notification – within 20 working days	663	100%
Death in service notification – within 10 working days	4	100%

#### Contribution Payments

The following tables compare the date contribution payments are received against the target date, of 19<sup>th</sup> 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	12	-	100%
Borders Sport and Leisure Trust	12	-	100%
AMEY Community Limited	12	-	100%
CGI	12	-	100%
South of Scotland Enterprise	13	-	100%

There were no late payments received during 2021-22.

#### Administering Authority Performance Measures

##### Service Standards

Standard	Volume	Target	%age Met
Estimates – Transfer In	51	20 days	68.00%
Estimates – Transfer Out	64	20 days	56.25%
Estimate – All Other	1,367	10 days	

With the continuation of homeworking due to the pandemic staff remained focused on ensuring payments were made on time and adapting to new working practices it was accepted that it was not going to be possible to record all queries received as in previous years. Therefore, it has not been possible to provide the split as previous. We also saw a move towards queries coming in via email and Members Self Service, which is reflected in the table below.

Type of Query	Volume	Target	%age Met
Phone Calls - logged	59	5 days	100%
Phone Calls to team	6,022	Not measured	
Emails to <a href="mailto:pensions@scotborders.gov.uk">pensions@scotborders.gov.uk</a> mailbox	4,102	Not measured	
Emails to team members directly	6,692	Not measured	
Correspondence via Members Self Service	550	Not measured	
Total	17,425		

### Other Measures

Area	Measure	Completed
Employer Liaison Meetings	1 per annum	15 <sup>th</sup> March 2022
Benefit Statements	by end of August	Issued by 16 <sup>th</sup> August 2021

The seventh liaison meeting, held virtually, with all Admitted and Scheduled Bodies was held during 2021/22 and re-enforced the changes that had been made to the annual reporting with the Fund Actuary from the 2020/21 year end 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 were issued in paper format to Deferred Members and loaded into the Member Self Service (MSS) portal, all Deferred Members were invited to sign up for MSS and advised that they will be published here going forward. The Annual Benefit Statements for Active Members were published to MSS and personal invitations to sign up were issued to all members either via the email address held on system or through the Employers.

### Key Administration Tasks

Task	Total received
New entrants	878
Early leavers	663
Retirements	289
Deaths in service	4
Deaths in deferment	3
Deaths in retirement	120
New Widows(ers), Child Pensions	63
Estimates	1,367
Pension credit members	0
Pay all Pensioners on 15 <sup>th</sup> of the month or prior working day when 15 <sup>th</sup> is a non-banking day	100% achieved

### Member Self Service Statistics

Task	Total Active	Target	% Completed in target
Active Members	4,703	100%	27.52%
Deferred Members	3,194	100%	
Benefit calculations run	12,579		