

APPENDIX 1

PENSION ADMINISTRATION PERFORMANCE 2022/23

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	100%
Change notification – within 20 days	950	100%
Retirement info – at least 20 working days before	158	100%
Early leaver notification – within 20 working days	571	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 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	11	1	91.67%
Borders Sport and Leisure Trust	12	-	100%
AMEY Community Limited	12	-	100%
CGI	12	-	100%
South of Scotland Enterprise	13	-	100%

There was one late payment during the year, this payment was received one day later than the required date, we will 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	130	20 days	69.23%
Estimates – Transfer Out	55	20 days	72.72%
Estimate – All Other	1,417	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 move to more 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	84	5 days	100%
Phone Calls to team	3,388	Not measured	
Emails to pensions@scotborders.gov.uk mailbox	9,880	Not measured	
Emails to team members directly	7,704	Not measured	
Correspondence via Members Self Service	1,921	Not measured	
Total	22,977		

Other Measures

Area	Measure	Completed
Employer Liaison Meetings	1 per annum	21 st March 2023
Benefit Statements	by end of August	Issued by 24 th August 2022

The eighth liaison meeting, held virtually, with all Admitted and Scheduled Bodies was held during 2022/23 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 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	836
Early leavers	571
Retirements	317
Deaths in service	4
Deaths in deferment	4
Deaths in retirement	129
New Widows(ers), Child Pensions	51
Estimates	1,417
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	4,842	100%	28.14%
Deferred Members	3,187	100%	
Benefit calculations run	16,715		