

## **PENSION ADMINISTRATION STRATEGY**

**Report by Director People Performance and Change**

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### **JOINT MEETING OF PENSION FUND COMMITTEE AND PENSION BOARD**

**4 March 2024**

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#### **1 PURPOSE AND SUMMARY**

- 1.1 **This report proposes the revised Pension Administration Strategy for the Scottish Borders Council Pension Fund.**
- 1.2 The Pension Fund is required by the Local Government Pension Scheme (Scotland) Regulations 2018 to have an up-to-date Pension Administration Strategy.
- 1.3 **Appendix 1** contains the revised Pension Administration Strategy which has a number of amendments made to the previously approved version, the main change is the introduction of a new contacts form to allow the Fund to maintain an up to date list of details for each of the Employers. Other changes are in the departmental names and post titles for officers and reference to the new Pensions Regulator Single Code of Practice.

#### **2 RECOMMENDATIONS**

- 2.1 **It is recommended that the Pension Fund Committee approves the Pension Administration Strategy.**

### **3 BACKGROUND**

- 3.1 Regulation 57 of the Local Government Pension Scheme (Scotland) Regulations 2018 advises that an administering authority should maintain its Pension Administration Strategy and keeps this under review following material changes in policies.
- 3.2 The review of the Pension Administration Strategy was highlighted as an area for improvement within the Governance review.

### **4 PENSIONS ADMINISTRATION STRATEGY**

- 4.1 **Appendix 1** contains the updated Pensions Administration Strategy (PAS).
- 4.2 The changes made within the PAS are to reflect the recent changes to the corporate structure within Scottish Borders Council with changes made to the Officers titles. There has been a change made to reflect the introduction of the Pensions Regulator Single Code of Practice. The updates were made in the following sections: -
  - Section 1.1 – reference to the Pensions Regulator’s Single Code of Practice
  - Section 3.3 – Officer title and Department names updated
  - Section 4.4 – updated text on the purpose of the annual Employer Liaison Meeting
- 4.3 The most substantial change within the PAS is the introduction of a new contract form for all Fund Employers to complete, this can be found at Appendix D within the attached document. This will allow the Fund to ensure that they have up to date contact details for all Fund Employers for each of the following area’s of interest: -
  - Primary pension liaison and communications
  - Bulk data submission and queries of Year End
  - Payroll/HR
  - Estimate requests
  - Policies and decisions
  - FRS102 accounts
  - IDRPs complaint and disputes procedure

Employers will also be asked to provide details of the Occupational Health Advisor that they are using.

### **5 IMPLICATIONS**

- 5.1 **Financial**  
There are no costs attached to any of the recommendations contained in this report.
- 5.2 **Risk and Mitigations**

This report is part of the governance reporting framework to manage the operation of the Pension Fund and reflects the compliance with the best practice recommendations. Risks regarding the administration of the Pension Fund have been identified and are included in the risk register.

### 5.3 **Integrated Impact Assessment**

There is no impact or relevance to Equality Duty or the Fairer Scotland Duty for this report. This is a routine good governance required under the Local Government Pension Scheme (Governance)(Scotland) Regulations 2018. Nevertheless, a light touch assessment has been conducted and this will be published on SBC's Equality and Diversity Pages of the website as in doing so, signifies that equality, diversity and socio-economic factors have duly been considered when preparing this report.

### 5.4 **Sustainable Development Goals**

There are no direct impacts from this report on the sustainable development goals of the Council.

### 5.5 **Climate Change**

There are no direct climate change impacts as a result of this report.

### 5.6 **Rural Proofing**

It is anticipated there will be no adverse impact on the rural area from the proposals contained in this report.

### 5.7 **Data Protection Impact Statement**

There are no personal data implications arising from the proposals contained in this report.

### 5.8 **Changes to Scheme of Administration or Scheme of Delegation**

No changes are required as a result of this report.

## 6 **CONSULTATION**

- 6.1 The Director (Finance & Procurement), the Director (Corporate Governance), the Chief Officer Audit and Risk, the Clerk to the Council and Corporate Communications and any comments received will need to be incorporated into the final report.

### **Approved by**

**Name**            **Clair Hepburn**            **Director People Performance and Change**

### **Author(s)**

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### **Background Papers:**

**Previous Minute Reference:** 14 December 2021

**Note** – You can get this document on tape, in Braille, large print and various computer formats by contacting the address below. Ian Angus can also give information on other language translations as well as providing additional copies.

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