

Administration Update 3 December 2025

Claire Newbery

Pensions Operations Manager



Agenda



Topics

Administration Updates

- Performance and KPIs
- Status 2's
- Data Improvement Plan
- Statutory Annual Requirements

Project updates:

- Pensions Dashboard
 - My Pension Online upgrade
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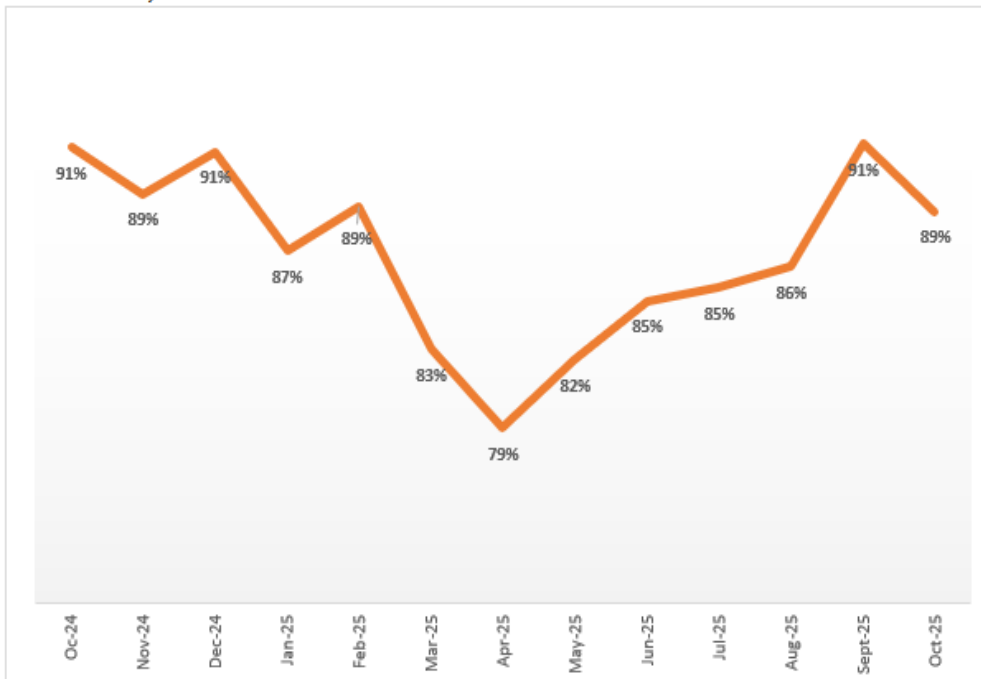
KPI's



SLA monthly performance average October 2024 to October 2025

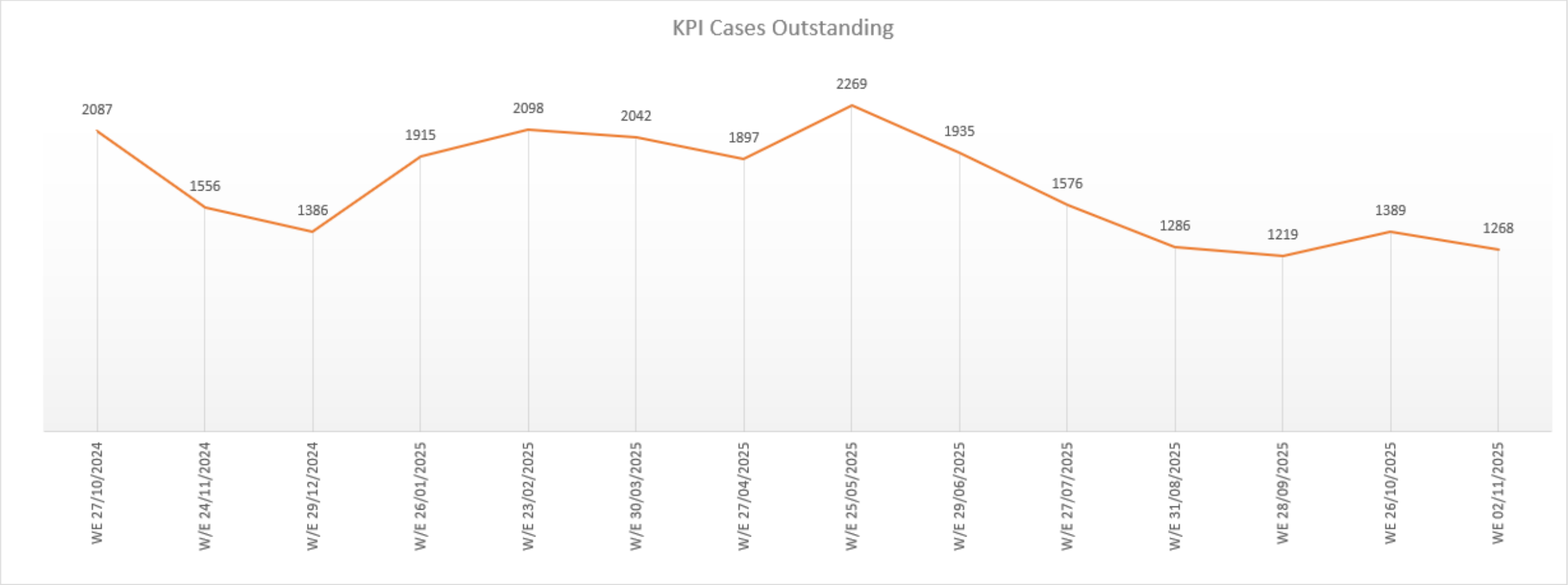
Average SLA Performance

*Based on weekly KPI data

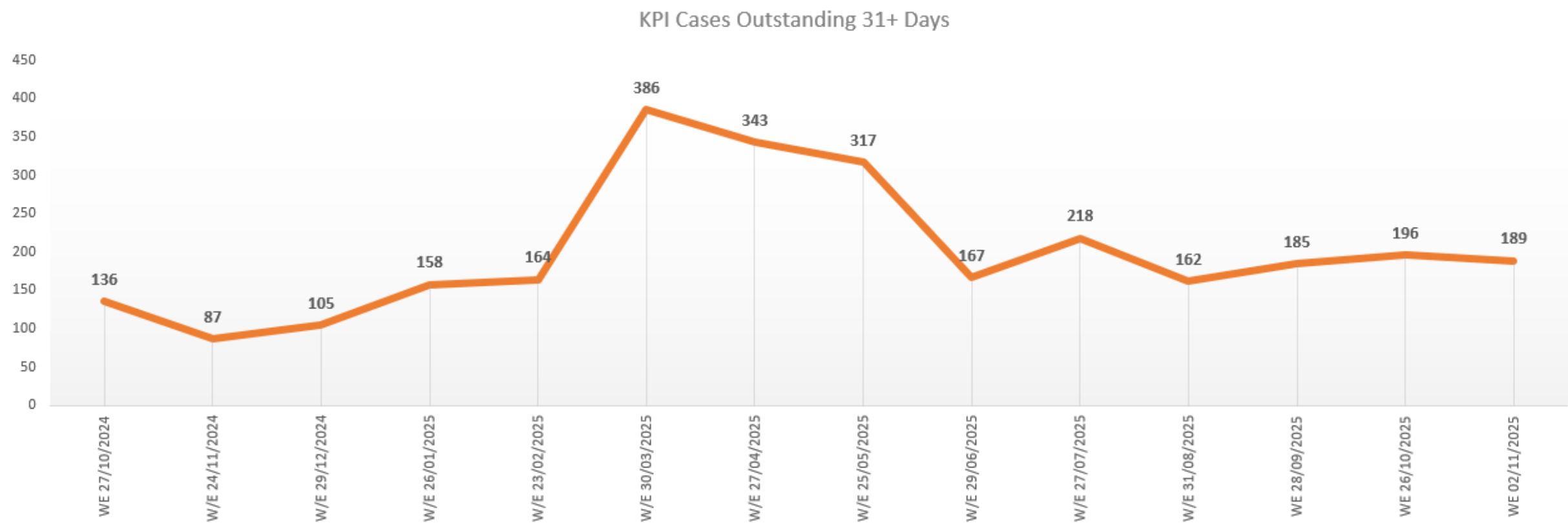


KPI Category	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sept-25	Oct-25	Cases Created Oct-23 to Oct-25
Death Notification	94.4%	94.0%	87.6%	100.0%	93.8%	63.8%	71.0%	76.7%	90.6%	97.0%	98.2%	94.8%	98.7%	1,259
Death - Act/Def/Pen - Payment	67.5%	94.4%	67.7%	81.6%	65.3%	59.9%	49.2%	60.3%	52.6%	70.4%	70.9%	51.4%	55.6%	951
Retirement (Active) - Quote	84.1%	60.0%	86.3%	45.5%	83.5%	77.7%	80.4%	69.7%	61.7%	76.8%	89.9%	85.0%	79.9%	3,112
Retirement (Active) - Actual	99.1%	96.7%	96.7%	94.4%	90.1%	83.5%	69.4%	78.5%	80.8%	97.0%	92.1%	90.6%	93.5%	2,132
Retirement (Deferred) - Quote	88.2%	98.2%	96.2%	73.8%	71.3%	57.0%	25.5%	72.3%	80.7%	68.7%	81.0%	93.5%	91.0%	4,989
Retirement (Deferred) - Actual	90.7%	98.8%	99.1%	99.0%	98.7%	77.0%	85.5%	77.4%	76.1%	88.5%	90.6%	90.9%	86.9%	3,340
Divorce - Quote	91.7%	100.0%	100.0%	100.0%	100.0%	100.0%	86.3%	95.5%	100.0%	96.4%	100.0%	96.9%	100.0%	573
Divorce - Actual	100.0%	33.3%	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	18
Refund - Quotes	75.1%	87.9%	66.4%	73.4%	93.3%	72.5%	52.5%	64.1%	67.3%	52.1%	36.1%	85.5%	84.2%	5,630
Refund - Actual	95.2%	85.3%	81.7%	66.7%	68.6%	61.1%	77.7%	39.3%	70.3%	94.8%	98.6%	100.0%	94.6%	2,140
Deferred Benefits	95.7%	76.9%	95.1%	92.6%	87.8%	86.0%	83.8%	84.6%	87.9%	97.8%	90.0%	90.8%	86.7%	6,355
Transfer In (Active) - Quote	91.8%	59.4%	56.6%	97.4%	93.9%	77.1%	60.0%	42.2%	64.9%	58.9%	44.7%	33.3%	95.5%	794
Transfer In (Active) - Actual	48.0%	51.4%	79.2%	0.0%	56.4%	50.0%	100.0%	63.9%	47.7%	78.6%	72.2%	83.3%	50.0%	387
Transfer Out (Active/Deferred) - Quote	42.5%	12.1%	46.6%	35.9%	2.8%	9.8%	30.4%	34.8%	27.2%	43.5%	46.4%	52.0%	8.8%	2,352
Transfer Out (Active/Deferred) - Actual	100.0%	100.0%	100.0%	100.0%	83.3%	100.0%	33.3%	100.0%	85.4%	100.0%	62.5%	77.8%	20.8%	239
Employer Estimate - Quote	94.4%	91.7%	80.8%	94.5%	100.0%	97.5%	92.0%	76.4%	86.4%	90.2%	91.7%	100.0%	91.7%	483
Member Estimate - Quote	86.9%	98.7%	100.0%	91.9%	97.5%	94.3%	96.3%	87.1%	100.0%	90.9%	77.2%	76.7%	60.8%	1,499
Joiner	100.0%	100.0%	100.0%	99.6%	100.0%	99.6%	99.8%	99.8%	100.0%	95.4%	100.0%	100.0%	100.0%	26,003
Weighted Average	91%	89%	91%	87%	89%	83%	79%	82%	85%	85%	86%	91%	89%	

Total KPI's outstanding – Oct 2024 to Oct 2025

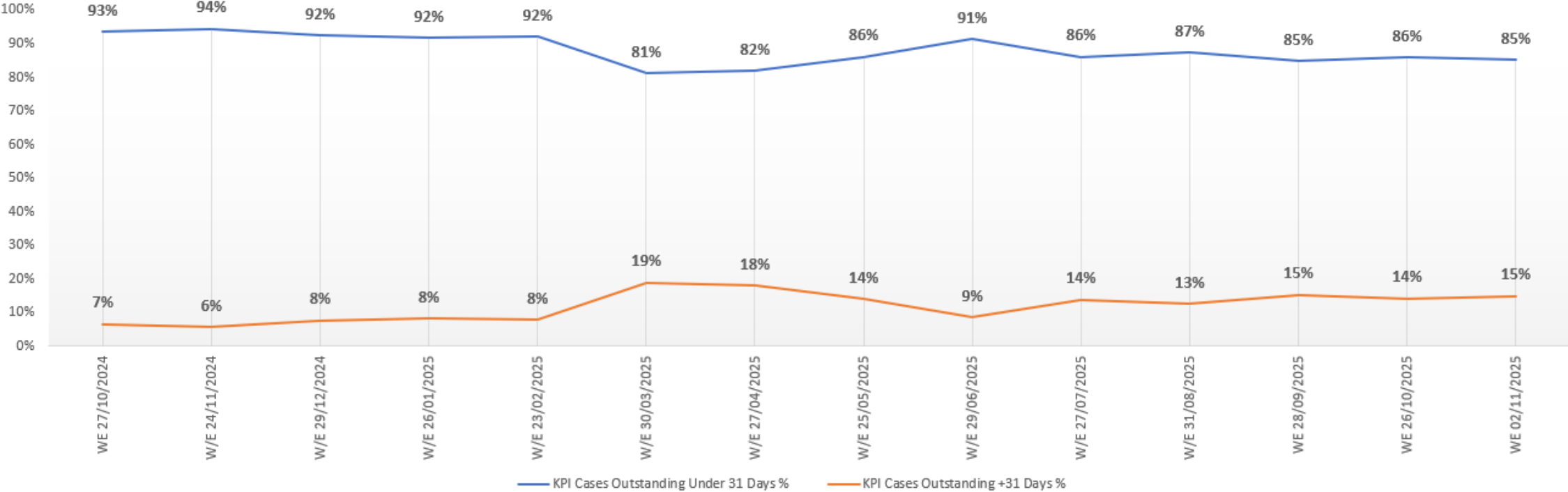


KPI's outstanding over 31 days – Oct 2024 to Oct 2025



KPI's case by age % - Oct 2024 to Oct 2025

Outstanding KPI Tasks by Age %



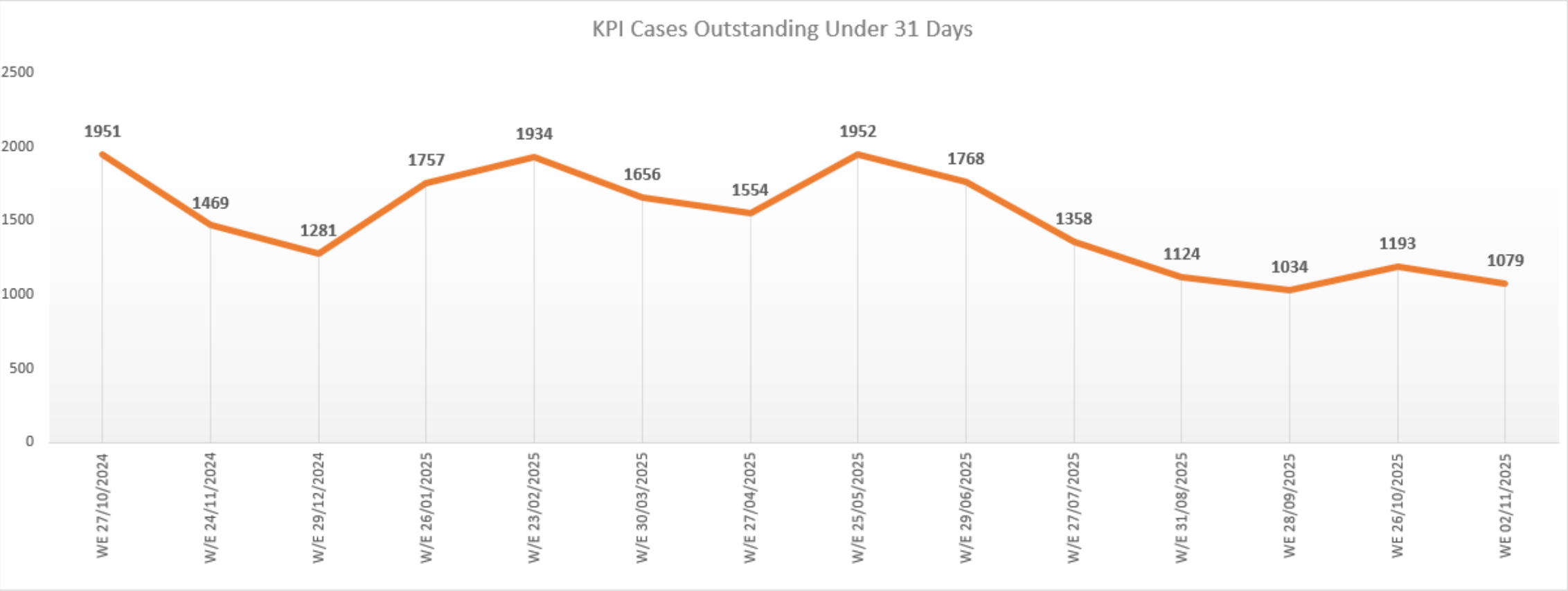
KPI cases completed period ending Oct 2025

(cases numbers v target – cumulative % processed)

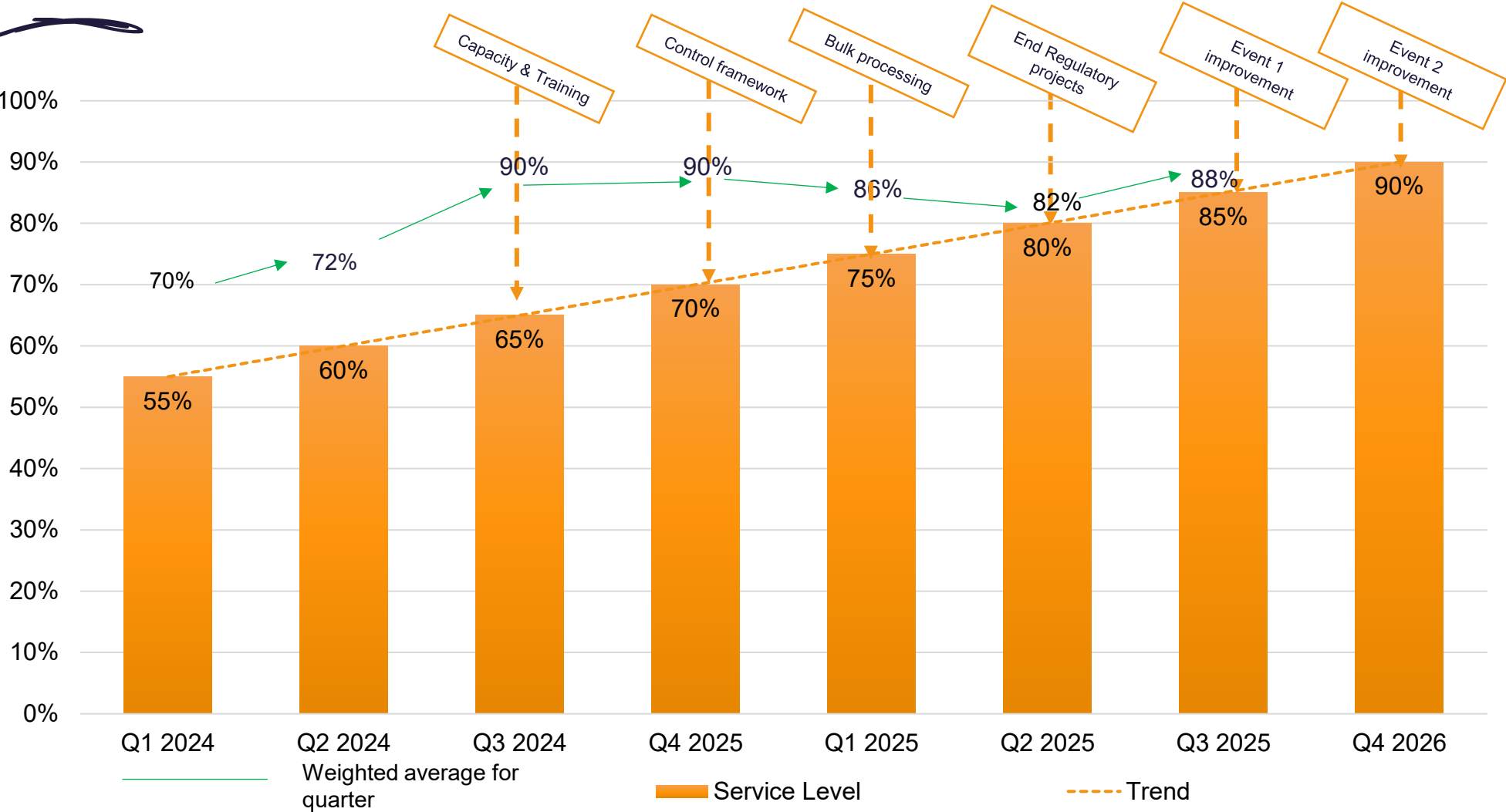


		Tasks Current Quarter									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	98%	100%								
Death - Act/Def/Pen - Payment	10 Days	25%	56%	69%	72%	78%	83%	83%	83%	89%	100%
Retirement (Active) - Quote	15 Days	38%	54%	79%	89%	92%	94%	98%	98%	100%	
Retirement (Active) - Actual	15 Days	72%	83%	94%	96%	96%	96%	96%	97%	99%	100%
Retirement (Deferred) - Quote	30 Days	12%	30%	49%	68%	81%	87%	93%	93%	95%	100%
Retirement (Deferred) - Actual	15 Days	55%	82%	87%	95%	96%	97%	98%	99%	99%	100%
Divorce - Quote	45 Days	36%	67%	74%	79%	90%	95%	97%	100%		
Divorce - Actual	15 Days										
Refund - Quotes	10 Days	66%	78%	82%	86%	89%	91%	96%	98%	100%	
Refund - Actual	10 Days	88%	96%	98%	99%	99%					
Deferred Benefits	30 Days	24%	54%	67%	76%	81%	86%	91%	96%	99%	100%
Transfer In (Active) - Quote	10 Days	73%	91%	100%							
Transfer In (Active) - Actual	10 Days	33%	67%	100%							
Transfer Out (Active/Deferred) - Quote	10 Days	3%	12%	43%	71%	83%	84%	97%	97%	100%	
Transfer Out (Active/Deferred) - Actual	10 Days	25%	25%	38%	63%	75%	88%	100%			
Employer Estimate - Quote	15 Days	68%	76%	92%	100%						
Member Estimate - Quote	15 Days	45%	56%	61%	85%	88%	95%	98%	98%	100%	
Joiner	40 Days	39%	91%	100%							

KPI cases outstanding under 31 days – Oct 2024 – Oct 2025



Service performance – plan v's actual – Oct 2025



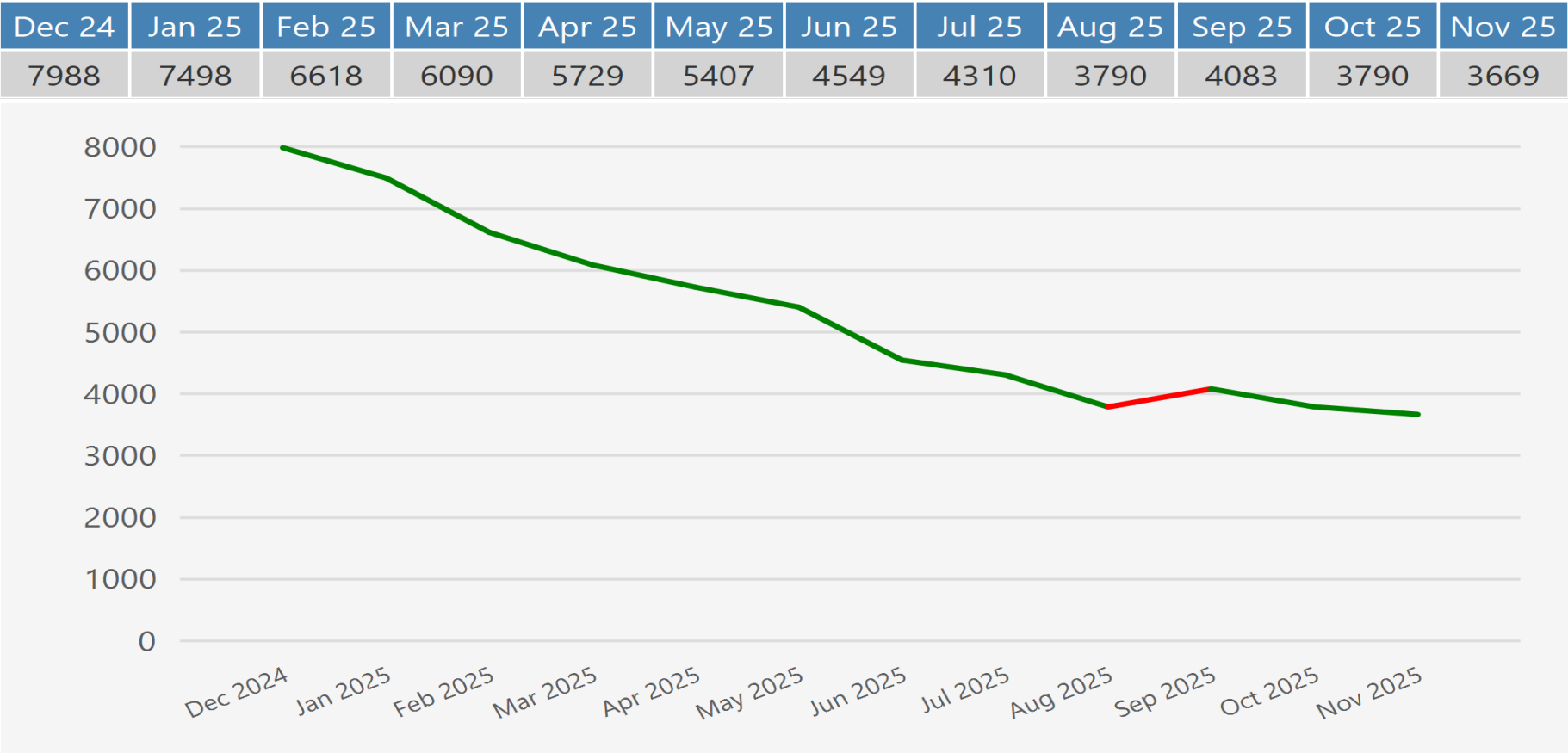
Status 2 Records



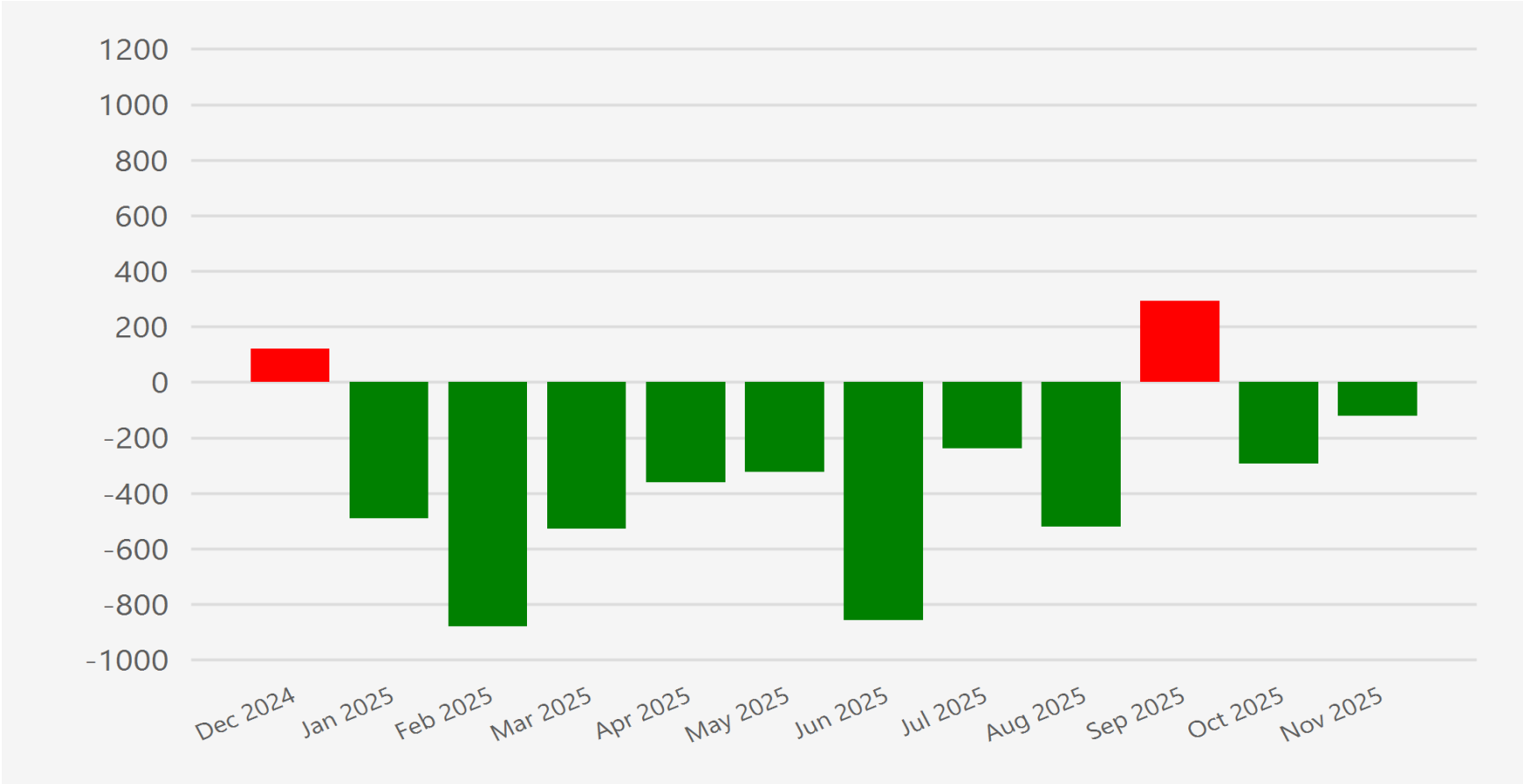
Status 2 Records



During the last year, the number of status 2 records we held on our system peaked at 8,307 during September 2024. Compared with 3,790 status 2 records as at the end of October 2025, this is a 55% reduction. This coincides with the peak number of outstanding leaver cases, which is broken down in future slides.



Status 2 Members Month on Month Reduction



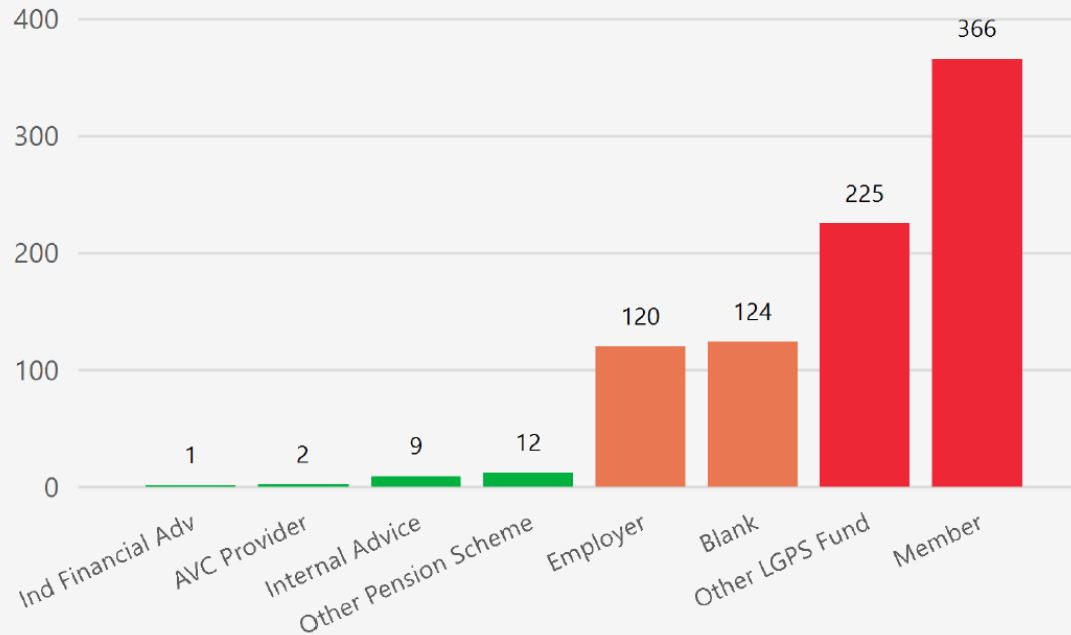
Status 2 Members Aged Analysis as at 06.11.2025



Time Period	
Post dated leave Date	24
0 – 3 Months	1847
4 – 12 Months	893
1 – 2 Years	299
2 Years +	463
Grand Total	3526

Type of Cases Outstanding on Status 2 Records

Status 2 Tasks - by Reply Due Type

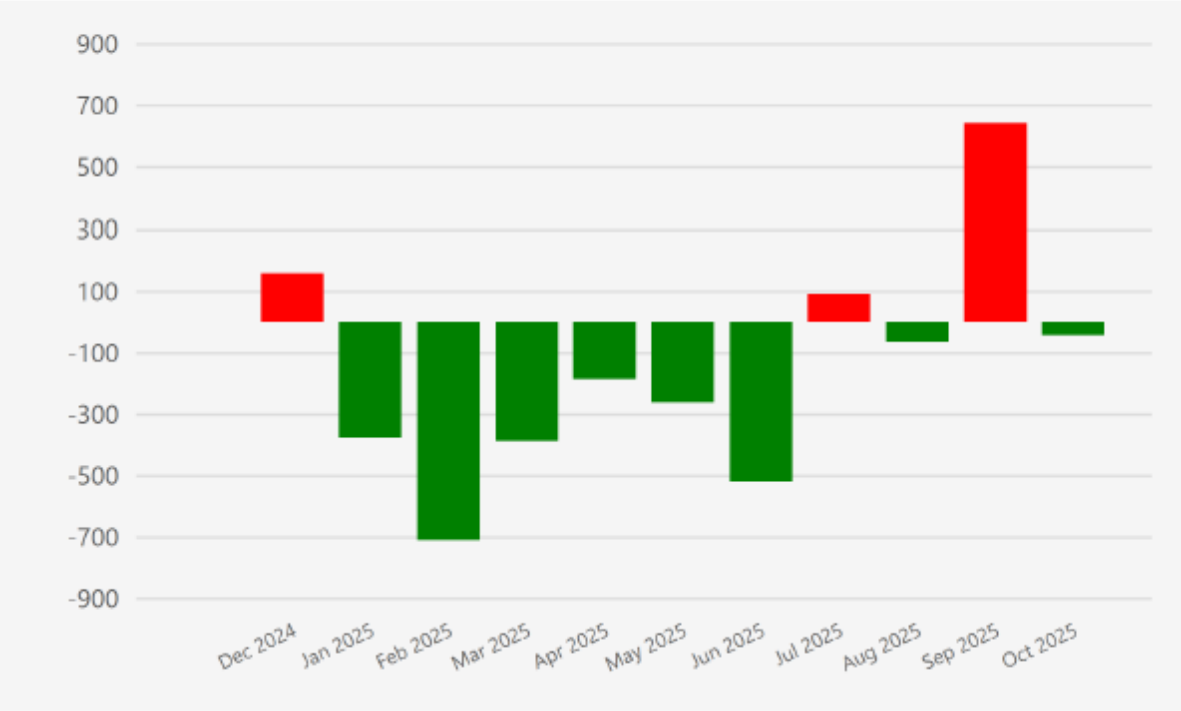


As at the end of October 2025, the total outstanding cases sat at 3669, of these, 859 are awaiting replies to enable processing.

366 are awaiting a response from the member and 225 are awaiting a response from another LGPS Fund

Status 2 - iConnect Leaver Cases

		Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025
Created	0	755	953	859	759	534	876	666	1092	750	1721	1138
Completed	0	597	1328	1569	1147	720	1137	1186	1001	814	1079	1181
Diff	0	158	-375	-710	-388	-186	-261	-520	91	-64	642	-43



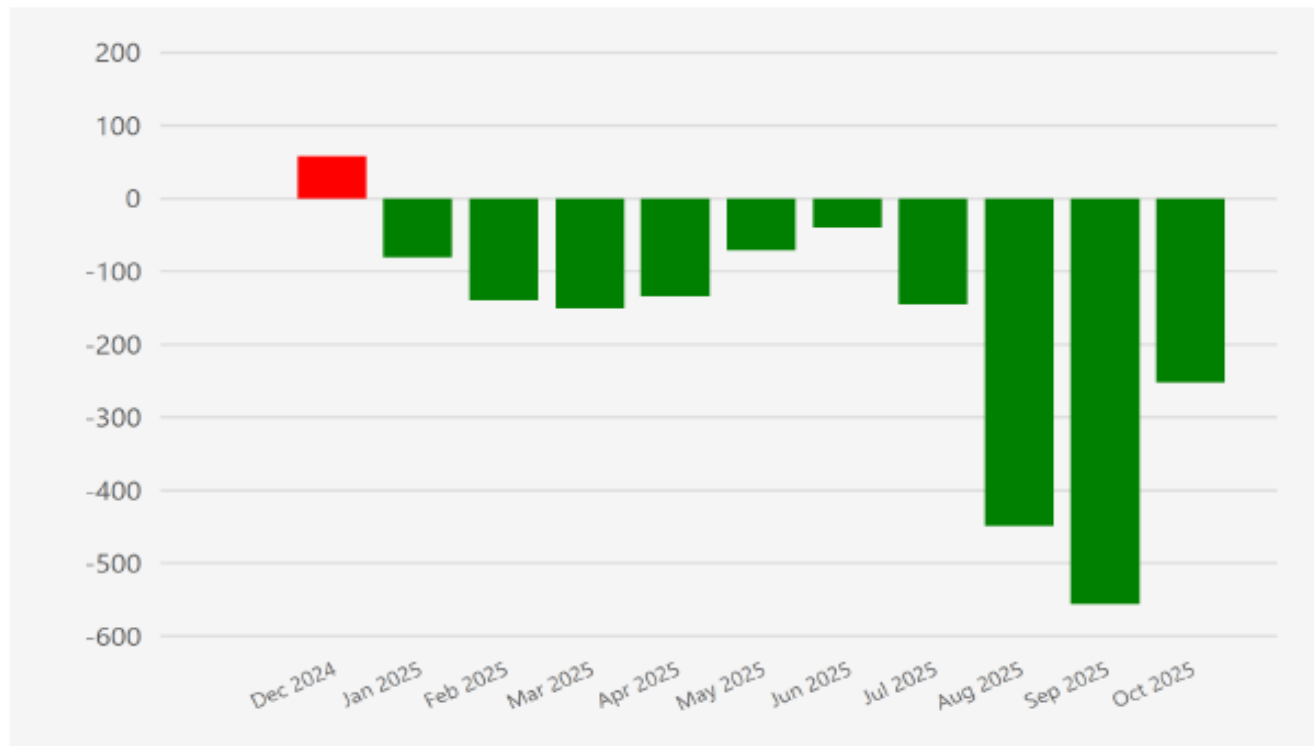
IC Leavers Created/Completed

This chart shows the amount of ICLEAVER tasks that have been created and completed between December 24 and October 25.

Spikes are experienced in both December and September on a yearly basis, with the highest number of created cases being in September 2025 with a figure of 1721

Status 2 – Aggregations (BAGGA)

		Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025
Created	0	238	376	608	542	297	443	696	537	509	416	713
Completed	0	180	457	748	693	431	514	736	682	958	972	965
Diff	0	58	-81	-140	-151	-134	-71	-40	-145	-449	-556	-252



The table shows Aggregations that have been created and completed from December 24 to October 25

An aggregation project was carried out between August and October to reduce the number of aggregations remaining in the fund

Statutory Annual requirements



Year End Overview



Data Return outcomes

- **504 employers** submitted year-end data returns, covering 41,709 members.
- **2 employers** (0.4%) were fined for late returns.
- **3 employers** (0.6%) were fined for excessive data queries (*less than 2% query rate).
- **8 employers** (1.6%) received a data improvement plan (**reduced from 21 in 2024).
- **Employer participation** increased by 4% compared to the previous year.

Process Improvements supporting improved outcomes

- **New APP Data Spreadsheet:** Introduced a structured spreadsheet for employers to submit additional APP data. Feedback was overwhelmingly positive, with many noting improved clarity and efficiency.
- **Online Declaration: Successfully** launched an online declaration tool, which was well-received by employers.
- **Enhanced Data Checks:** The Data Control Team's proactive checks throughout the year led to a smoother year-end, reducing queries and enabling completion by the fund two weeks earlier than in 2024.

Annual Benefit Statements 2025

Active ABS 2025				Deferred ABS 2025			
	Postal	Email	Total		Postal	Email	Total
Group 1 - McCloud protected with underpin	274	328	602		223	120	343
Group 2 - McCloud protected with £0.00 underpin	3294	4061	7355		3524	2511	6035
Group 3 - McCloud protected but cannot quote underpin value	13	33	46		8	13	21
Group 4 - No McCloud protection - non qualifying	19595	10982	30577		23579	11292	34871
Totals			38580				41270
Starting Population	39087 inc errors				45392 inc errors		
Active errors (for review and correction)	14				62		
Removed Gone Aways	43				3827		
Removed £0.00 Pension	440				171		
Removed Other queries	10				62		
Starting population less errors / removed cases =	38580				41270		
Percentage of populaion issued	98.70%				90.92%		
October re-run - Number issued	35				66		

Project Updates

Richard Hopkins
Project Manager



My Pension online

Overview

- | | |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| What it is ? | <ul style="list-style-type: none">• Provides secure, 24/7 access to pension information• Enable lifestyle-based retirement planning• Getting to members pension details quicker• Support digital-first member engagement |
| Benefits | <ul style="list-style-type: none">• SMS two-factor authentication for enhanced security• Accessible, user-friendly design• Clear retirement planning tools• Fast, easy access to pension details |
| What and how the project delivered | <ul style="list-style-type: none">• DPIA for governance and compliance• Platform build and workflow setup• User testing across Fund teams• Registration campaign and stakeholder engagement• Staff training and rollout support |
| Future Developments | <ul style="list-style-type: none">• Boost member registrations – developing communication opportunities• Online P60s and payslips• Digitised workflows and processing |



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Use our retirement planner to set or edit calculations based on your expenditure vs income to help ensure your retirement matches your lifestyle.



Annual Benefit Statements

View and compare all of your previous Annual Benefit Statements in one location.



Manage beneficiaries

Manage who should receive your pension benefits if you pass away.



Benefit calculators

Our online retirement calculators will help you work out what you're likely to receive when you retire.



Latest valuation

View the most recent valuation of your pension and a detailed breakdown of your pension benefits.

Pensions Dashboard Update

