



Pensions Committee
Date 5 December 2025

Item

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Public

Pensions Administration Monitoring Report

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Cabinet Member (Portfolio Holder):			

1. Synopsis

The report provides members with monitoring information on the performance of and issues affecting the pensions administration team.

2. Executive Summary

- 2.1. Detail is provided on team workloads and performance, and projects currently being undertaken, including valuation 2025, Annual Benefit Statements and Pension Dashboards.
- 2.2. Information is also included regarding regulatory changes and the work undertaken by the Scheme Advisory Board.

3. Recommendations

- 3.1. Members are asked to note the KPI chart and information on those KPI's not currently meeting the 95% target and the actions being taken to address this. (Appendix A).
- 3.2. Members are asked to note the progress and completion of key activities from the business plan 2024-25 up to Q2. (Appendix B).
- 3.3. To note the progress of the Pension Dashboard implementation which is provided in the update report (Appendix C).

Report

4. Risk Assessment and Opportunities Appraisal

4.1. Risk Management

Performance is considered and monitored to ensure regulatory timescales and key performance indicators are adhered to. Administration risks are identified and managed and are reported to committee on an annual basis.

4.2. Human Rights Act Appraisal

The recommendations contained in this report are compatible with the Human Rights Act 1998.

4.3. Environmental Appraisal

There is no direct environmental, equalities or climate change consequences of this report.

5. Financial Implications

- 5.1. Managing team performance, collaborating with other administering authorities, and making best use of the technology that is available to use ensures costs to scheme employers for scheme administration are kept to a minimum.

6. Climate Change Appraisal

- 6.1. Energy and fuel consumption: No effect
Renewable energy generation: No effect
Carbon offsetting or mitigation: No effect
Climate Change adaptation: No effect

7. Performance and Team Update

- 7.1. The team's output and performance level for the period 1 April 2025 to 30 September 2025 up to Q2 is attached at **Appendix A**. The chart shows that 9 of the 16 KPIs are achieving at least 95% of cases being completed by the legal timeframes.
- 7.2. In September's report we noted how through the summer the team have been extremely busy working through several projects, and how this can impact on the business-as-usual work as we must prioritise certain areas of work that need to be

completed for the projects to succeed. However, I'm pleased to say that we have seen little negative impact across our KPIs and have even seen improvement on the KPIs where we are not achieving 95% of cases being completed by the timescales.

- 7.3. It is worth noting the improvement to the KPIs for transfers, this has been down to a change to how we resource these cases.
- 7.4. Following this success, we will be introducing a new process for allocating work within the Membership and Benefits team. Assignments will now be distributed according to individual skill sets and capacity, rather than the current alphabetical split, where all officers manage multiple types of casework such as retirements, deaths, and transfers. This new approach will also consider staff absences and project commitments. After implementation, we will review and set customer service targets for providing information to members. We will update the information shared with both the committee and board to reflect our performance against these targets.

8. Communications

- 8.1. The following chart shows statistics on the work undertaken by the helpdesk team not covered by the workflow system or reported with the wider team statistics in Appendix A.

	April 2025	May 2025	June 2025	July 2025	Aug 2025	Sep 2025
Telephone calls received to helpdesk team	696	618	552	628	523	608
% of calls answered	94%	96%	97%	97%	95%	98%
Contact us forms/Emails received to pensions@shropshire.gov.uk	681	814	680	798	756	907
% responded to within 10 working days	100%	100%	100%	100%	100%	100%
My Pension Online activation keys issued	70	102	67	102	97	113
Incoming post received and indexed to the pensions administration system (items per day)	103	102	109	105	94	92
1-2-1 video appointments held with scheme members	11	5	4	6	5	4
Users visiting the website*	3,759	758	797	794	769	812

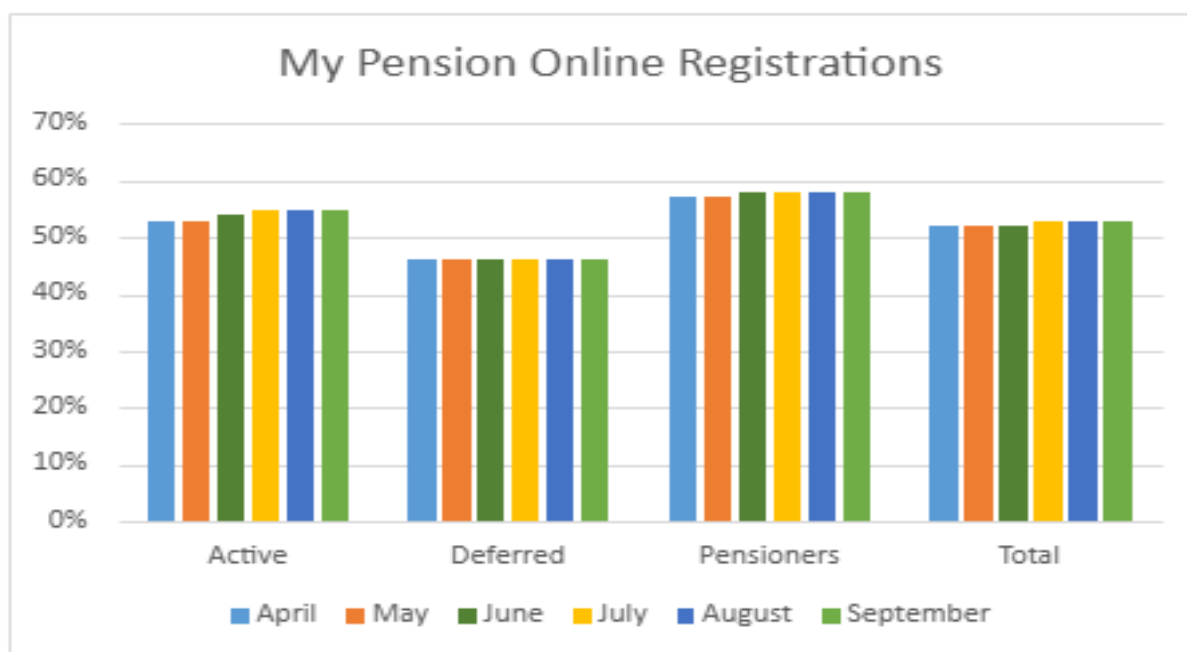
* This number indicates the number of users who have clicked to accept the cookie, which will then record their visit to the website. If members do not click this their visit is not recorded. This accounts for the drop in visit numbers from April 2025.

- 8.2. The team has received more enquiries through the 'contact us' form, which efficiently directs queries to the right member as it collects all required information from the initial enquiry.

- 8.3. We continue implementing a process where members are asked to upload documents to the 'my pension online' portal instead of emailing them to the helpdesk or sending in via post, as this method is more secure and efficient.
- 8.4. Penny the Pensions Bot which can be accessed via our website, continues to support members by answering questions, the chart below shows the accuracy rate for the responses provided. The table shows that we are receiving more enquiries via the Bot and that the accuracy rate is hovering around the 75% - 83% rate. We continue to look at the information bank and add in more information to help support members with their questions.

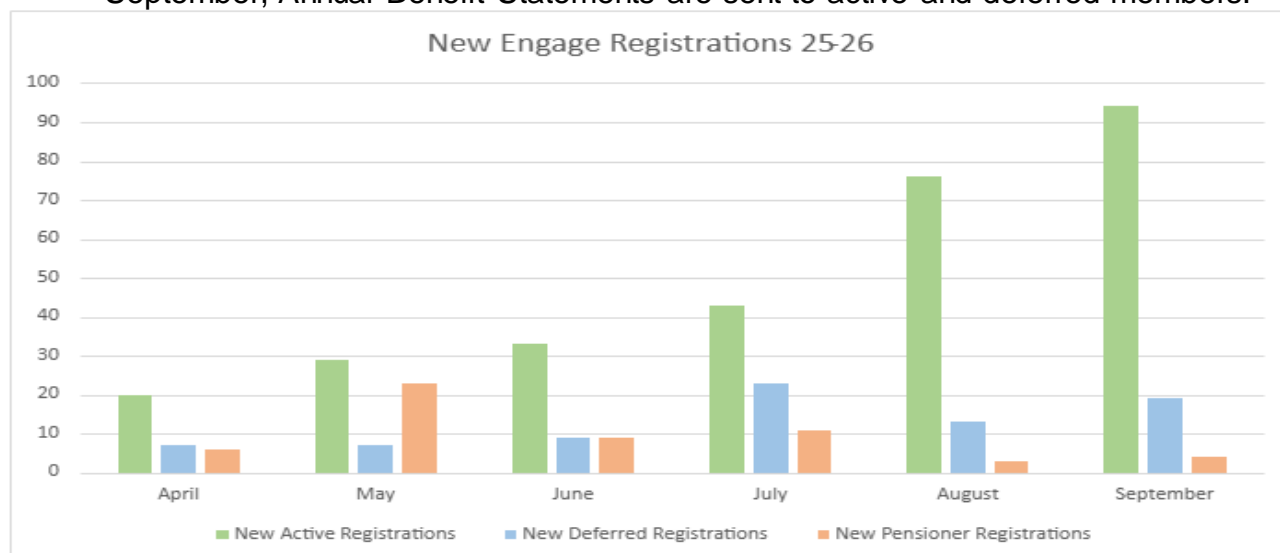
	2025	Apr	May	Jun	Jul	Aug	Sep
Questions submitted		96	99	116	81	113	133
Asked an expert		6	5	10	9	5	14
Accuracy %		83%	79%	83%	75%	78%	77%

- 8.5. The table below shows the percentage of members who have registered for 'My Pensions online' by the different member types in the fund. It encouraging to see that we are seeing a steady increase in the numbers registering for the service for active and pensioner members.
- 8.6. We are currently planning to do a tracing exercise that will update member addresses for those that have lost touch with the fund, these are predominantly deferred members as they are no longer contributing. Once this exercise is completed, we will look to make a concerted effort to contact all deferred members currently not registered for 'my pension online' to encourage members to register.



- 8.7. The chart below shows the number of new registrations we have received since April 2025. The spike in numbers correlates with campaigns where we have sent

out information to members, i.e. May – Pensioner P60s are sent out, July to September, Annual Benefit Statements are sent to active and deferred members.



9. Employer Performance

- 9.1. In line with the Shropshire County Pension Fund administration strategy, employers must pay their contributions and lump sum deficit payment by the 19th of the month. Accompanying data must also be submitted via i-Connect by this date. The below table shows the percentage of employers who have made payments by the deadline over this quarter.
- 9.2. September has been a difficult month in terms of data submissions and payment of deficit payments. 2 employers changed their payroll provider, and both could not submit their first extract accurately and on time. 1 is a multi-academy trust (MAT) and has 12 schools in the fund who are all treated as separate scheme employers. There were also some new academies and Admitted Bodies who could not send their first submission on time.
- 9.3. The onboarding process for the data submission service iConnect can be time consuming as we collaborate with new employers to deliver the relevant training to understand the system and the extract they must populate. We also must ensure that member records are updated with any new reference information that will be needed in readiness for the first submission from their new employer or payroll provider.
- 9.4. The low percentage in September for the lump sum deficit payments was due to one multi-academy trust with several schools who make separate payments. The 19th fell at a weekend which makes the due date the Friday, but payment was made on the Monday after the due date. Employers are being reminded of deadlines and the importance of submitting data in plenty of time ahead of the deadline.

	April 2025	May 2025	June 2025	July 2025	August 2025	September 2025
i-Connect data received on time	99%	97%	99%	98%	99%	87%
Monthly contributions received on time	99%	100%	99%	98%	98%	98%
Monthly deficit lump sum payments received on time	96%	98%	80%	96%	96%	90%

10. Projects

10.1. The fund's business plan for 2025/26 with comments on activities undertaken in Q1 and Q2 is available at Appendix B. All work that was scheduled for these quarters has been started and completed within the set timescales.

10.2. **Valuation** - The individual employer results have been distributed to employers, and an employer meeting was held on 24 November with the fund's actuary to provide updates regarding funding and investment strategies. The Funding Strategy document has been reviewed and revised in collaboration with the actuary, and the final draft will be presented to the committee during the update from Mercer. After the committee agrees on the draft, a consultation with employers will be conducted before committee ratification in March.

10.3. **Pension Dashboards** – See Appendix C for the latest project report. The annual address tracing project will enhance our data quality and support member data matching on dashboards. We are evaluating additional work areas and any necessary process or staffing changes to prepare for dashboard implementation. Increased member engagement may lead to more benefit payments or transfers for previously inactive members. Further updates will be shared at future committee meetings.

11. Regulatory updates

11.1. September 2025 CPI Rate Announcement

On 22 October 2025, the Office for National Statistics reported that the annual increase in the Consumer Prices Index (CPI) for September 2025 was 3.8 per cent. In line with recent government policy, adjustments under the Pensions (Increase) Act 1971 and the revaluation of pension accounts as stipulated in section 9 of the Public Service Pensions Act 2013 are based on the CPI rate for September of the previous year.

We are currently awaiting official confirmation from the Government regarding the application of this 3.8 per cent rate to the revaluation and pension increases for LGPS active pension accounts, deferred pensions, and pensions in payment, effective April 2026.

Pensions Committee: Administration and Regulatory Update September 2025

Local Member:

Appendices [Please list the titles of Appendices]

Appendix A – KPI tables Q2 2025

Appendix B – Business Plan Q2 2025

Appendix C – Dashboard Project update
