



**Pensions Committee**  
**Date 19 June 2026**

Item

7

Public

## Pensions Administration Monitoring Report

|                                           |                                                                                  |      |              |
|-------------------------------------------|----------------------------------------------------------------------------------|------|--------------|
| <b>Responsible Officer:</b>               | Vicky Jenks                                                                      |      |              |
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| <b>Cabinet Member (Portfolio Holder):</b> |                                                                                  |      |              |

### 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 Annual Benefit Statements and Pension Dashboards.
- 2.2. Information is also included on regulatory changes impacting on the work of the administration team.

### 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. To note the progress of the Pension Dashboard implementation which is provided in the update report (Appendix C).
- 3.3. To note the regulatory updates are having a significant impact on the work of the team.

# 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 31 March 2026, is attached at Appendix A. The chart shows that 10 of the 14 KPIs are achieving at least 95% of cases being completed by the legal time limits.
- 7.2. In February, we introduced a new process for distributing work within the Membership and Benefits team. Cases are now assigned based on individual skills and capacity, rather than alphabetically, where officers handled a mix of case types such as retirements, deaths and transfers. As the new process becomes established, we are seeing improvements in both allocation and completion rates. Older transfer cases are now being cleared, so overall case completions are increasing, although the KPI will take time to improve until the older cases are reduced.

- 7.3 However, scheme regulation changes taking effect from 1<sup>st</sup> April, including retrospective checks on certain cases, death grants, partner benefits, and the change to the SCAPE rate from 19 May, mean that some cases will need to be delayed until updated factors are available. This is likely to create a backlog, which will then need to be cleared once the factors and updates to the system are issued.

## 8. Staffing

- 8.1. Recent staffing changes have taken place within the administration team due to retirement, internal promotions, and maternity leave.
- 8.2. Neil Twidale, a valued member of the Systems and Employer Relations team for over 30 years, retired on 31st March. We extend our sincere gratitude for his dedication and commitment throughout his time on the team. This transition has enabled us to promote another team member, with the subsequent backfilling of this position also through promotion.
- 8.3. Martin Griffiths who recently joined the team as Communications and Governance Team Leader will be leaving on 30 June as he has been successful in gaining a position with Nottingham Pension Fund. We have advertised this post and have successfully appointed a replacement who will start in July.
- 8.4. Additionally, the membership and benefits team has established a new Pensions Officer role to manage the increased workload resulting from regulation changes effective from April.
- 8.5. We have appointed a new Helpdesk Officer to fill an existing vacancy and welcomed three new Pensions Assistants to address vacancies arising from maternity leave, promotions, and staff departures.

## 9. Communications

- 9.1. 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.
- 9.2. The helpdesk is the gate keeper of all initial enquiries received by the team; these enquiries are triaged and directed to another member of the team to complete. More general enquiries can be answered by the helpdesk.
- 9.3. Work is being done to streamline how enquiries are received and reduce delays that may be created by how these are prioritised.

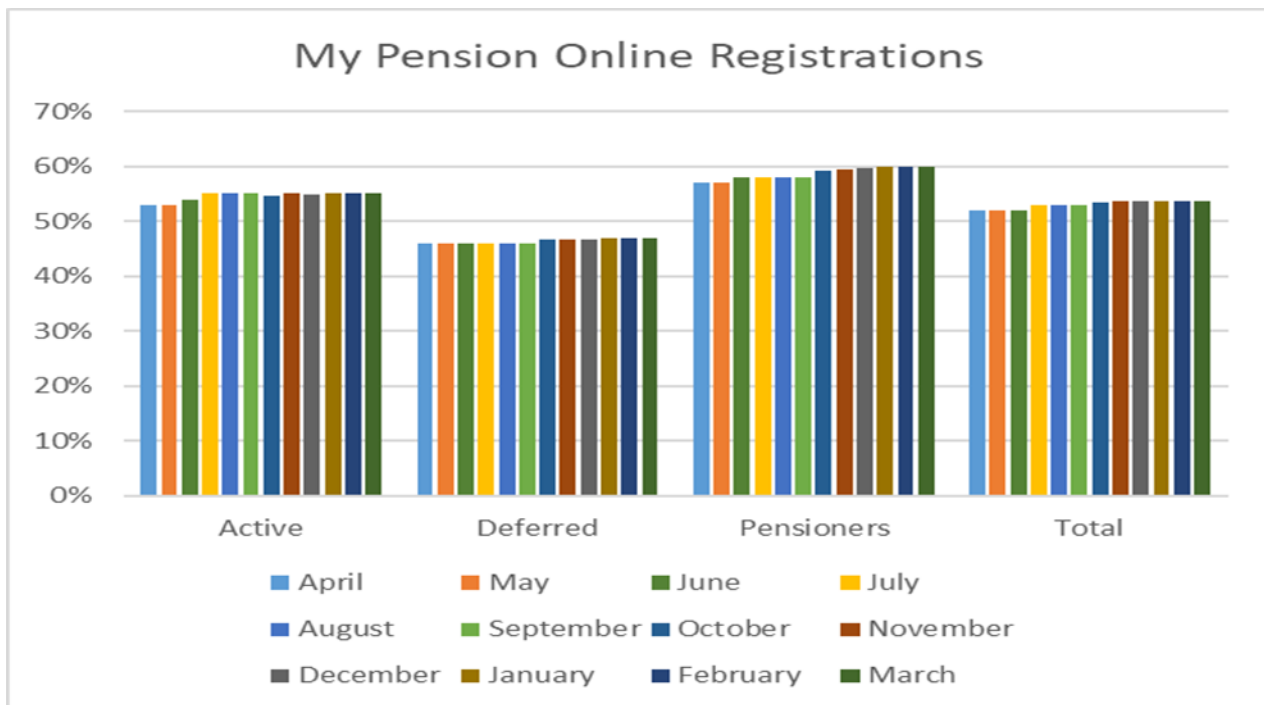
|                                                                        | April 25 | May 25 | June 25 | July 25 | Aug 25 | Sep 25 | Oct 25 | Nov 25 | Dec 25 | Jan 26 | Feb 26 | Mar 26 |
|------------------------------------------------------------------------|----------|--------|---------|---------|--------|--------|--------|--------|--------|--------|--------|--------|
| Telephone calls received to helpdesk                                   | 696      | 618    | 552     | 628     | 523    | 608    | 575    | 514    | 449    | 587    | 585    | 640    |
| % of calls answered                                                    | 94%      | 96%    | 97%     | 97%     | 95%    | 98%    | 97%    | 94%    | 94%    | 97%    | 96%    | 96%    |
| Contact us forms and Emails received to <a href="#">pensions inbox</a> | 681      | 814    | 680     | 798     | 756    | 907    | 767    | 778    | 524    | 553    | 769    | 863    |
| % responded to within 10 working days                                  | 100      | 100    | 100     | 100     | 100    | 100    | 100    | 100    | 100    | 100    | 100    | 100    |
| My Pension Online activation keys issued                               | 70       | 102    | 67      | 102     | 97     | 113    | 90     | 75     | 61     | 145    | 136    | 111    |
| Incoming post received (items per day)                                 | 103      | 102    | 109     | 105     | 94     | 92     | 123    | 85     | 104    | 88     | 107    | 91     |
| 1-2-1 video meetings                                                   | 11       | 5      | 4       | 6       | 5      | 4      | 2      | 4      | 3      | 5      | 11     | 7      |
| Users visiting the website*                                            | 3,759    | 758    | 797     | 794     | 769    | 812    | 804    | 617    | 562    | 672    | 710    | 695    |

\* Cookies has been accepted to track movement around website

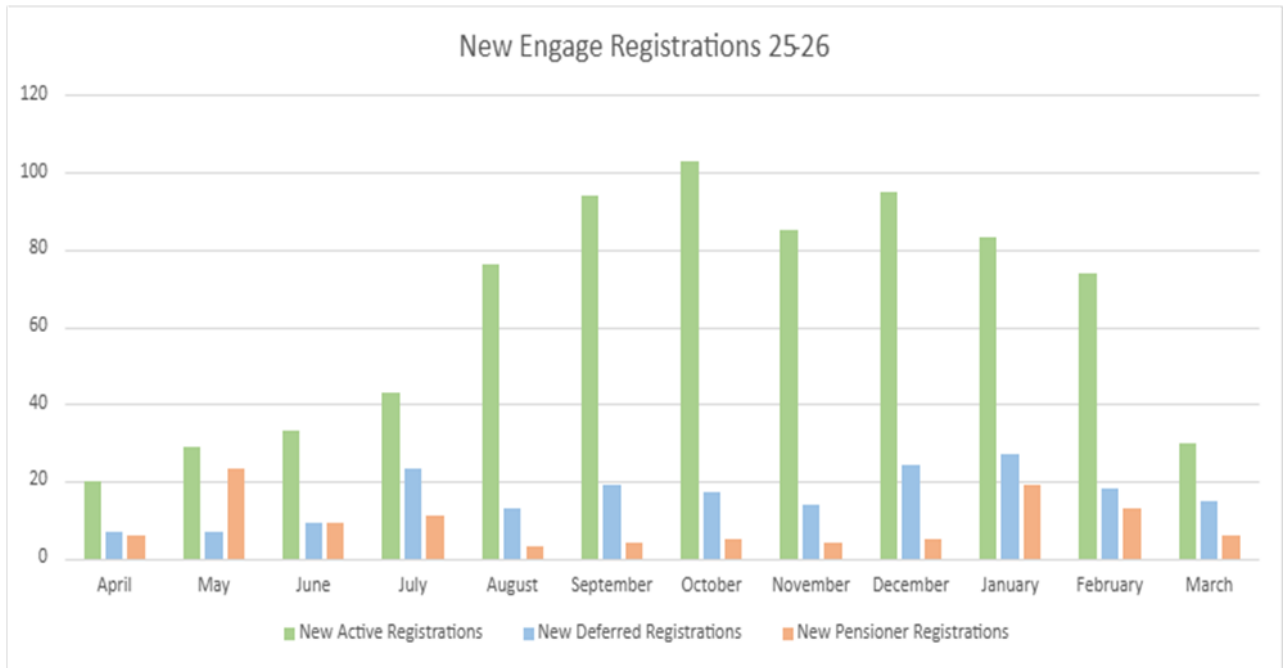
Penny the Pensions Bot achieved an average accuracy rate of 76% over the year, showing consistent support to members while highlighting scope for further improvement. The team are continually reviewing the questions asked and supplementing the information bank to enhance the quality of the responses provided.

| 2025/2026           | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
|---------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Questions submitted | 96  | 99  | 116 | 81  | 113 | 133 | 119 | 147 | 75  | 70  | 70  | 109 |
| Asked an expert     | 6   | 5   | 10  | 9   | 5   | 14  | 8   | 19  | 6   | 8   | 4   | 10  |
| Accuracy %          | 83% | 79% | 83% | 75% | 78% | 72% | 73% | 73% | 73% | 69% | 75% | 74% |

9.4. The table below shows the percentage of members who have registered for ‘My Pensions online’ by the different member types in the fund. It’s encouraging to see that we are seeing a steady increase in the numbers registering for the service for active and pensioner members.



- 9.5. 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.
- 9.6. When an employee joins the pension scheme a new membership form is sent out with an instruction to set up the online account. This way we can then communicate with more members via digital communications, which is more effective and efficient.



## 10. Employer Performance

10.1. 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.

10.2.

|                             | <b>i-Connect Submissions on time</b> | <b>Contributions paid on time</b> | <b>Lump sum deficit payments paid on time</b> |
|-----------------------------|--------------------------------------|-----------------------------------|-----------------------------------------------|
| April 2025                  | 99%                                  | 99%                               | 96%                                           |
| May 2025                    | 97%                                  | 100%                              | 98%                                           |
| June 2025                   | 99%                                  | 99%                               | 80%                                           |
| July 2025                   | 98%                                  | 98%                               | 96%                                           |
| August 2025                 | 99%                                  | 98%                               | 96%                                           |
| September 2025              | 87%                                  | 98%                               | 78%                                           |
| October 2025                | 90%                                  | 98%                               | 100%                                          |
| November 2025               | 90%                                  | 97%                               | 100%                                          |
| December 2025               | 90%                                  | 97%                               | 89%                                           |
| January 2026                | 99%                                  | 99%                               | 91%                                           |
| February 2026               | 99%                                  | 99%                               | 98%                                           |
| March 2026                  | Not available                        | Not available                     | Not available                                 |
| <b>Average for the year</b> | <b>95%</b>                           | <b>98%</b>                        | <b>93%</b>                                    |

10.3. We have been working with two employers who have changed their payroll provider. This has proved challenging as there have been issues with data supplied and delays with getting a satisfactory submission provided. The team are looking at creating an information guide for employers which will clearly set out the

requirements to help make this process smoother for both the Fund and employers.

10.4. Although the contributions have been received for those employers who have moved payroll provider, the difficulty has been the data uploads, and this is reflected in the table. One of the employers is a Multi Academy Trust with 12 schools treated separately for pension purposes, so the payroll moves make up 13 of the late submissions for September, October, and November. As of February 2026, both employers who have changed payroll provider are now up to date with their data submissions.

## 11. Projects

11.1. The fund's business plan for 2025/26 with comments on activities undertaken for 2025-2026 is available at Appendix B. All work that was scheduled for these quarters has been started and completed within the set timescales. The business plan for 2026-27 has been drawn up and an update for Q1 will be provided in September.

11.2. **Valuation** – Has now been completed, with all employers agreeing to their new rates and accepting the Funding Strategy Statement. New rates have been implemented from 1 April 2026 and will run through to 31 March 2029. The team will be monitoring the payments received from April to ensure the new rates are being implemented correctly. Work on the Investment Strategy Statement is underway, following this committee meeting it will be shared with both Board and Employers to gather any feedback before it is approved by Committee in September.

11.3. **Pension Dashboards** – See Appendix C for the latest project report. The annual address tracing project has commenced; we are working through the updates to member addresses and have introduced new processes to verify the information we have received. We have also been reviewing the data standards reporting requirements so that we can introduce the new processes into our workplans.

11.4. **Pensions Increase** – the team have now applied the annual increases applicable to member records. Pension members will see a part month increase for April as the increase is applied from the first Monday of the new tax year (6th April). We have also issued P60s and the Pensioner newsletter to our pensioner members.

11.5. **Year End** – the team are now working through the year end reconciliation of data and contributions received for all employers in the Fund. This work is normally completed towards the end of June. Once this is completed, we can then move on to start work on Annual Benefit Statements.

11.6. **Annual Benefit Statements** are sent out to all Active and Deferred members every year. This must be completed by 31 August, if 100% of statements are not sent out this must be reported to the Pensions Regulator. The team are on track for statements to be sent out to Deferred members by the end of July and Active statements will be sent by mid-August.

## 12. Regulatory updates Check Paragraph numbering below

12.1. The Access and Fairness scheme changes implemented from 1 April 2026, aim to make benefits fairer and more accessible for all members. Several updates will address equality issues:

- **Fairer Survivor Benefits:** Survivor pension rules are being updated so eligible spouses and civil partners are treated equally, regardless of when or which section you joined. Affected survivor pensions will increase.
- **Consistent Treatment:** Members with similar service will now receive the same benefits, eliminating past inconsistencies.

**Effective Date:** Changes start from 1 April 2026, with some updates backdated.

### Key Changes:

- **Death Grants:** The age limit for death grant eligibility has been removed for deaths after 1 April 2014, including for those who died over age 75.
- **Faster Payments:** The previous two-year limit before a tax charge on Death Grants is removed.

### Gender Pension Gap Remedies:

- Unpaid breaks under 15 days count towards your pension.
- You can buy back pension lost during unpaid breaks over 14 days, with employers able to contribute for absences over three years.
- The deadline to decide on buying back lost pension is extended from 30 days to one year if you remain employed.
- Child-related leave now includes unpaid maternity, adoption, and shared parental leave.

Further LGPS changes will be announced later this year.

Under disclosure requirements the fund must send out a notification to all effected members to notify them of the changes. This must be done within 3 months of the change. The team have planned and sent out notification of the changes to affected members. Information has been added to the website.

Access and Protections Consultation – We have received a partial response for changes listed in this consultation. Access to the LGPS for elected members came into force on 11 May 2026, the first Monday after the local elections. Councillors will need to opt into the scheme, and further information is available on the pension fund website. We expect further updates on other changes later in the year, including the increase in the normal minimum pension age from 55 to 57 in April 2028.

### 13. LGPS England & Wales Scheme Advisory Board (SAB) 2025/26 Board Annual Review

13.1. [The Board's 2025/26 Annual Review](#) has now been published. The review focuses on the Board's key workstreams in the past year and the expected workstreams for the year ahead. Amongst other topics, the future workstreams will include:

- assisting the Scheme with embedding the Fit for the Future investment, pooling, and governance changes
- increased engagement with pension committees and boards
- reviewing guidance for local pension boards
- undertaking peer support pilot events
- closing down the central Code of Transparency data system and launching a new Code of Transparency framework.

Pensions Committee: Administration and Regulatory Update March 2026

**Local Member:**

**Appendices** [Please list the titles of Appendices]

**Appendix A – KPI tables Q4 2025-26**

**Appendix B – Business Plan Q4 2025-26**

**Appendix C – Dashboard Project update to May 2026**