

Nottinghamshire Pension Fund Annual General Meeting

Transforming pension administration through
digital development and new ways of
working

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- July 2019 Pensions Committee approved the development of a programme of work to transform pension administration through digital development and implementation of new ways of working
- Nottinghamshire Fund
 - Over 146,000 members (active, deferred and pensioners)
 - 341 scheme employers, 31% increase since 2014-2015
- LGPS under greater scrutiny from Pension Regulator
 - Compliance is key
 - Data Improvement plan
 - Stipulated that expects Funds to enable employers and members to interact with the Fund via digital platforms
 - Stated that monthly data submissions should be the default



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**Transforming pension
administration**

12 September Pension Committee approved scope of the digital programme

- Improve data quality and increased process automation
- Enable Scheme Employers to interact with the fund via a secure portal
- Enable Members to access information about their pension benefits through a secure portal
- Pension Office
 - Administration by exception
 - Moving administrators to work on complex and unusual cases



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Aims of the Programme

- Pension Regulator requires Funds to have an improvement plan
- Good quality data is critical element to success of digital programme
- First two phases approved by Committee
 - Data Audit
 - Forensic analysis
- Lead to an Improvement phase – scope of this phase will be determined from outputs of data audit and forensic analysis
- Scheme Employers
 - Individual data scores
 - Work with the Fund to resolve historical data issues
- Continuous process

- Final UAT underway
- Portal to be piloted with Nottinghamshire County Council
- Engaged with a number of other employers who will join the second stage of the pilot
- Plan to rollout during 2020 to other employers
- Secure portal for interactions between Employers and Fund
- Limited access to members records
- Implementation of monthly returns
 - New starters, changes, leavers and monthly contributions
 - Data validation checks prior to submissions
 - Errors resolved by Employers
 - Automated processes for loading starters etc



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Scheme Employers Portal

- Proposed to scope this phase during second half of 2020.
- Portal will provide secure access to Members to
 - Self serve
 - Maintain their own personal data
 - Review Annual Benefits Statement online
 - Future initiate online retirement process
 - Securely communicate with the Fund

- **Scheme Employers**
 - Support through the Employer Support and Compliance Team
 - Future - planning a series of events to demonstrate and provide training for the
 - Scheme Employers Portal
 - Monthly returns
- **Members**
 - Benefits of interacting with the Fund via digital platform