

Pensions Administration

Annual General Meeting 2026

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**Nottinghamshire
County Council**

Another busy and challenging year for Pensions Administration

- Scheme membership continues to grow.
- Fund continues to see significant levels of members seeking early release of benefits
- National Projects
 - McCloud – implementation of the remedy
 - National Dashboards – the Fund is now connected to Civica our chosen ISP and continuing its preparations for go live
- Local Projects
 - Automation and digitisation of processes
 - Employer portal
 - Civica UPM hosting
- Ongoing review and update of the Fund's Risk Register

Type of Member	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
Active Members	43,957	44,299	45,758	47,140	49,546
Deferred members	60,935	62,501	65,212	54,867	55,996
Preserved Refunds*	-	-	-	12,289	12,119
Pensioners	40,481	42,715	44,732	45,896	48,363
Total Membership	145,373	149,515	155,702	160,192	166,024



- All employers submitted their data, albeit a number missed the return deadline
- Employer Support & Compliance Team work to support employers with year-end submissions and data quality
- Annual Benefit Statements issued

Type of Member	Date of distribution	Number of statements issued
Deferred	August 2025 (83%)	46,477
	September 2025 (2%)	1,120
Councillors	August 2025	58
Active	August 2025 (91%)	45,087
	December 2025 (1%)	495
Total		93,237

- Contributions
 - Employer Contributions £216m
 - Member Contributions £63.8m
 - Pension benefits Paid £244m

Cipfa benchmark Key Performance Indicators - Annual Comparison

Process	2023 to 2024			2024 to 2025			Year on Year INCREASE or DECREASE
	Cipfa Benchmark Legal Requirement (from notification)	% of cases completed within the CIPFA KPI	No. cases completed	Cipfa Benchmark Legal Requirement (from notification)	% of cases completed within the CIPFA KPI	No. cases completed	No. cases completed
Deaths (ALL)	2 Months	59.73	976	2 Months	67.96	1005	↑ 29
or							
Deaths – Acknowledging death of member Letter	2 Months	62.22	450	2 Months	80.50	441	↓ -9
Deaths – Letter notifying amount of dependants pension	2 Months	53.99	526	2 Months	61.35	564	↑ 38
Deferments	2 Months	20.79	3,738	2 Months	30.71	3,735	↓ -3
Retirements (All)	2 Months	89.53	7,194	2 Months	88.47	7,709	↑ 515
or							
Retirements – Process & Pay Pension Benefits (at next available payroll)	2 Months	84.44	2,764	2 Months	83.16	3,160	↑ 396
Retirements – Estimate of retirement benefits Letter (Cat A)	2 Months	96.82	1,446	2 Months	95.00	1,780	↑ 334
Retirements – Estimate of retirement benefits Letter (Cat B)	2 Months	92.16	102	2 Months	94.31	123	↑ 21
Deferred Retirement Quotes (No SLA Equiv)	2 Months	90.67	2,882	2 Months	90.14	2,646	↓ -236
Transfer Quotes	2 Months	35.97	709	2 Months	44.16	693	↓ -16
Divorce Quotes (No SLA Equiv)	3 Months	97.95	292	3 Months	98.81	337	↑ 45
Divorce Settlement (No SLA Equiv)	3 Months	36.36	11	3 Months	33.33	9	↓ -2
Refund (No SLA Equiv)	2 Months	98.22	674	2 Months	97.71	743	↑ 69



Total number of Completed Processes In The Financial Year

Table 1

Years	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
No of Processes completed	51,976	56,722	53,121	56,900	58,576	64,408	75,979
Difference	0	4,746	-3,601	3,779	1,676	5,832	11,571
% Change in Difference	→ 0.00%	↑ 9.13%	↓ -6.35%	↑ 7.11%	↓ 2.95%	↑ 9.96%	↑ 17.97%

All KPI Activities Reported in The Pension Administration System

Table 2							
Years	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
No of KPI Processes Completed	10,688	12,138	11,723	14,773	13,130	14,558	15,548
Difference	3,071	1,450	-415	3,050	-1,643	1,428	990
% Change in difference	↑ 40.32%	↑ 13.57%	↓ -3.42%	↑ 26.02%	↓ -11.12%	↑ 10.88%	↑ 6.80%



Deaths

Yearly Deaths					
Years	2020/21	2021/22	2022/23	2023/24	2024/25
Number of Deaths per year	1,199	1,005	1,123	634	612
Difference	0	-194	118	-489	-22
% Change in Difference	→ 0.00%	↑ 28%	↑ 12%	↓ -44%	↓ -3%

Monthly Averages					
Years	2020/21	2021/22	2022/23	2023/24	2024/25
Number of Average Monthly Deaths	100	84	94	53	51
Difference	0	-16	10	-41	-2
% Change in difference	→ 0.00%	↓ -16%	↑ 12%	↓ -44%	↓ -3%



Continuing our journey of transformation, digital development and new ways of working



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- **Data audit and improvement - Data is key!**

- Responsibility of Members, Employers and the Pension Fund
- Data audit and improvement is continuous and is fundamental to administration
- Data scores
 - Common data – static over the last two years
 - Scheme specific – good improvement

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
Common Data	76%	85%	87%	87%	87%
Scheme Specific Data	43%	54%	63%	64%	83.9%

- Employer audit
- Automation
- Mortality screening and address verification
- Customer Service Centre
- Data Improvement plan

Activity	Status
Upgrade Scheme Employer Hub	<ul style="list-style-type: none"> • Project re-started following resolution of security vulnerability identified in Pen testing. • Planning underway to transition existing Scheme Employers & rollout to other Scheme Employers
Automation <ul style="list-style-type: none"> • Leaver & Refund process • Aggregation • Deferred retirement quotes 	<ul style="list-style-type: none"> • Live • Live • Final stages of testing
Pilot mortality screening and address verification project	<ul style="list-style-type: none"> • Procurement complete • First screen scheduled for early February 2026
Transfer of pension calls to Customer Service Centre	<ul style="list-style-type: none"> • Operational – further refinement and work to increase % of calls resolved at first point of contact
UPM hosting – Civica Cloud	<ul style="list-style-type: none"> • Project underway • Scheduled to go live March 2026
Payroll move to UPM and deployment of member portal	<ul style="list-style-type: none"> • Project in progress – go live June/July 2026

The Year Ahead looks busy!

- Business As Usual
- National Projects
 - McCloud – ongoing
 - Pension Dashboards
- Data Improvement on going
- Automation – further development
- Portal access to drive self service
- Fit for the Future