

APPENDIX 1

PENSION ADMINISTRATION PERFORMANCE 2025/26

In accordance with the Pension Administration Strategy, approved 4 March 2024, the following performance measures have been compared against the targets set within the said strategy document.

Employer Performance Measures

Service Standards

Standard – target completion 90%	Volume	%age Met
New starts notification – within 20 working days	674	99.01%
Change notification – within 20 days	861	99.42%
Retirement info – at least 20 working days before	378	100.00%
Early leaver notification – within 20 working days	462	100.00%
Death in service notification – within 10 working days	5	100.00%

Contribution Payments

The following tables compare the date contribution payments are received against the target date, of 19th of the month, for each of the Scheduled and Active Admitted Bodies.

Employer Body	By Target Date	Late	% On Time
Scottish Borders Council	12	-	100%
Borders College	12	-	100%
Scottish Borders Housing Association	12	-	100%
Live Borders	12	-	100%
AMEY Community Limited	12	-	100%
CGI	12	-	100%
South of Scotland Enterprise	13	-	100%

Administering Authority Performance Measures

Service Standards

Standard	Volume	Target	%age Met
Transfer In – Completed	42	20 days	40.48%
Transfer Out - Completed	32	20 days	68.75%
Estimate – All Other	1,681	10 days	

With the continuation of hybrid working staff it was accepted that it was not going to be possible to record all queries received as in previous years. We also saw a further shift to queries coming through in a digital manner via email and Members Self Service, which is reflected in the table below.

Type of Query	Volume	Target	%age Met
Phone Calls to team	2,481	Not measured	
Emails to pensions@scotborders.gov.uk mailbox	7,267	Not measured	
Emails to team members directly	4,421	Not measured	

Correspondence via Altair & Member Self Service	17,717	Not measured
Total	31,886	

Due to the long term absence of a member of the team it has not been possible to capture and include number of phone calls and emails they have received.

Other Measures

Area	Measure	Completed
Employer Liaison Meetings	1 per annum	19 th March 2026
Benefit Statements	by end of August	Issued by 26 August 2026

The eleventh liaison meeting, held virtually, with all Admitted and Scheduled Bodies was held during 2025/26 and afforded the employers the chance to ask questions to the Pensions Team. Going forward we will continue to hold the liaison meeting towards the end of the financial year where we will discuss up-coming legislative changes and requirements for the year end processing.

The Annual Benefit Statements for Active and Deferred were loaded into the Member Self Service (MSS) portal. Communications were issued via the scheme employers to alert scheme members that this was now available. All Deferred Members have been invited to sign up for MSS and were advised that they will be published online going forward. There have been regular reminders issued to those not yet signed up and requests made via employers to encourage their scheme members to sign up, this will be an ongoing exercise.

Key Administration Tasks

Task	Total received
New entrants	645
Early leavers	462
Retirements	378
Deaths in service	5
Deaths in deferment	5
Deaths in retirement	142
New Widows(ers), Child Pensions	65
Estimates	1,681
Pension credit members	0
Pay all Pensioners on 15 th of the month or prior working day when 15 th is a non-banking day	100% achieved

Member Self Service Statistics

Task	Total Active	Target	% Completed in target
Active Members	4,839	100%	24.15%
Deferred Members	3,140	100%	
Benefit calculations run	See Below		

There is currently no option to obtain statistics on the number of calculations run within the new version of Member Self Service, an enhancement request has been raised with Heywood.