SOUTH YORKSHIRE
PENSIONS AUTHORITY

Pensions Administration Performance Update Quarter 4 2024/25

24 April 2025

Contents

Highlights and Recommendations

Highlights over the quarter to the end of March 2025 include:

- SLA of Priority casework stayed the same as last quarter at 61% meeting targets.
- Reduced backlog of outstanding casework by 67%
- 92% of members responding to surveys were satisfied.
- 100,236 (55.32%) members registered for online portal.
- 11 Appeals, 14 Breaches, 17 complaints
- 575 Active Employers

Quarter 4, to 31 March 2025, saw further improvements to the Authority's pension administration service.

The service is working to an overall improvement plan with progress summarised in the table below:

Corporate Action 25/27	Update	On Target
A1 – Improvements in Data Quality	Data Quality Policy drawn up together with a record of all monitoring and reviewing activities undertaken across the year.	Yes
A2 – Recruit to the Pensions Administration structure	Recruitment to the revised structure is complete	Completed
A3 – System Improvements	Concerns with Civica stalling system developments.	No
A4 – Clear backlogs	67% of backlog cleared as at 31 March 2025.. Focus is on clearing backlog work that will impact valuation.	At Risk
A5 – Implement the McCloud Remedy	Further delays for phase 2 developments. Risk added to Risk Register.	No
A6 – Successfully link SYPA to the Pensions Dashboards	Project running on time. ISP awarded to Civica.	Yes

Revised Priorities for Pensions – 2025-28

Corporate Action 2025/28	Existing/New	Commenced
PA1 - Clear the remaining Backlogs of casework and ensure arrangements in place to prevent further backlogs developing	Existing	Yes
PA2 - Plan and deliver the Valuation 2025, including increased engagement with employers.	New	Yes
PA 3 - Implement the McCloud Remedy successfully.	Existing	Yes
PA4 - Deliver the Data Quality Improvement Plan	New	Yes
PA5 - Ensure Pensions Administration software system is developed, and its functionality used to optimal effect for achieving efficiencies, to the extent possible.	Existing	Yes
PA6 - Implement the Pensions Dashboards to required timescales	Existing	Yes

The Local Pension Board are recommended to:

a. Note the contents of this report with or without comment.

Background

The Pensions Administration Service is the Authority's largest outward facing service managing the organisation's relationship with our nearly 181,000 scheme members and nearly 600 employers. The success of the Administration Service is crucial to the success of the organisation and this report aims to set out for the most recent quarter and the financial year to date:

- Levels of activity related to both scheme member and employer activity.
- Levels of performance against the agreed standards
- Progress on delivering key projects and major cyclical activity
- Emerging policy issues and their implications for the Authority.

This report, like other performance information, is published on the Authority's website as well as being considered at meetings of the Local Pension Board.

Membership Profile at 31/03/2025
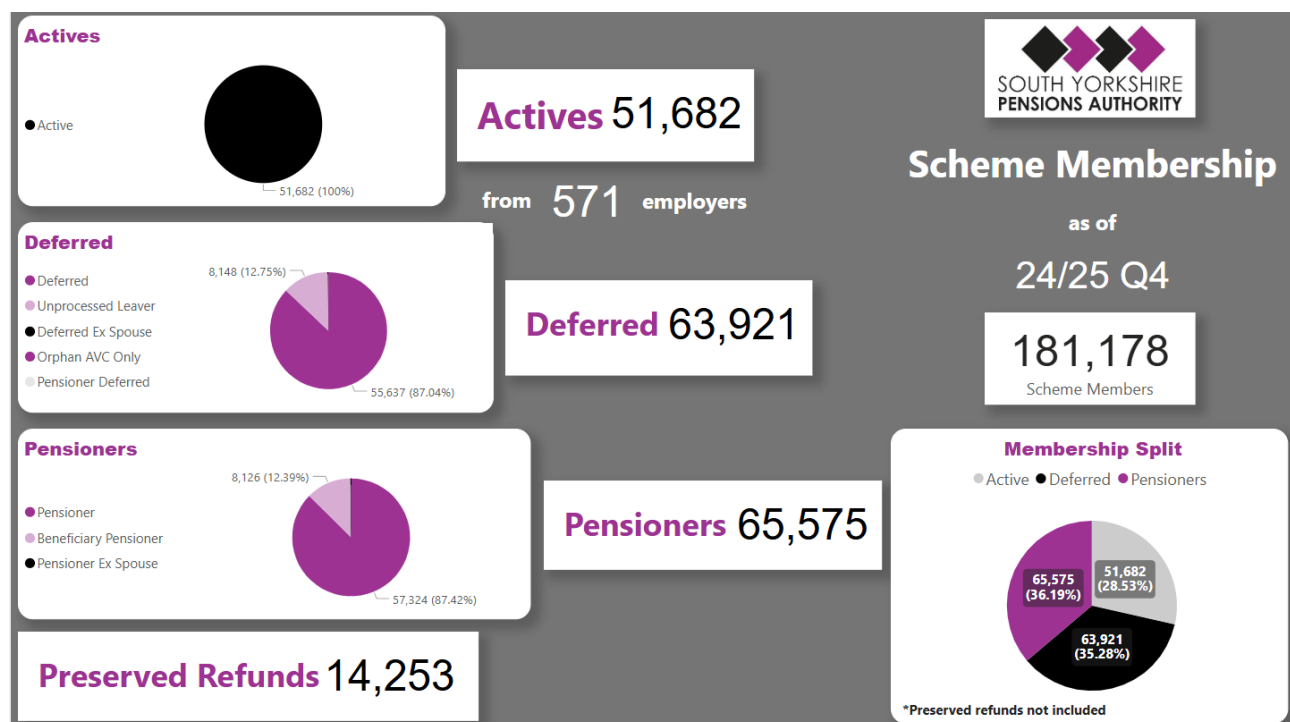
Active members make up around 28% of the current membership. This is a marked reduction to the 55% 20 years ago. For reference the number at Q1 were;

Actives

- Active

50,983 (100%)

Actives 50,983

from **556** employers

SOUTH YORKSHIRE PENSIONS AUTHORITY

Scheme Membership

as of

24/25 Q1

179,513

Scheme Members
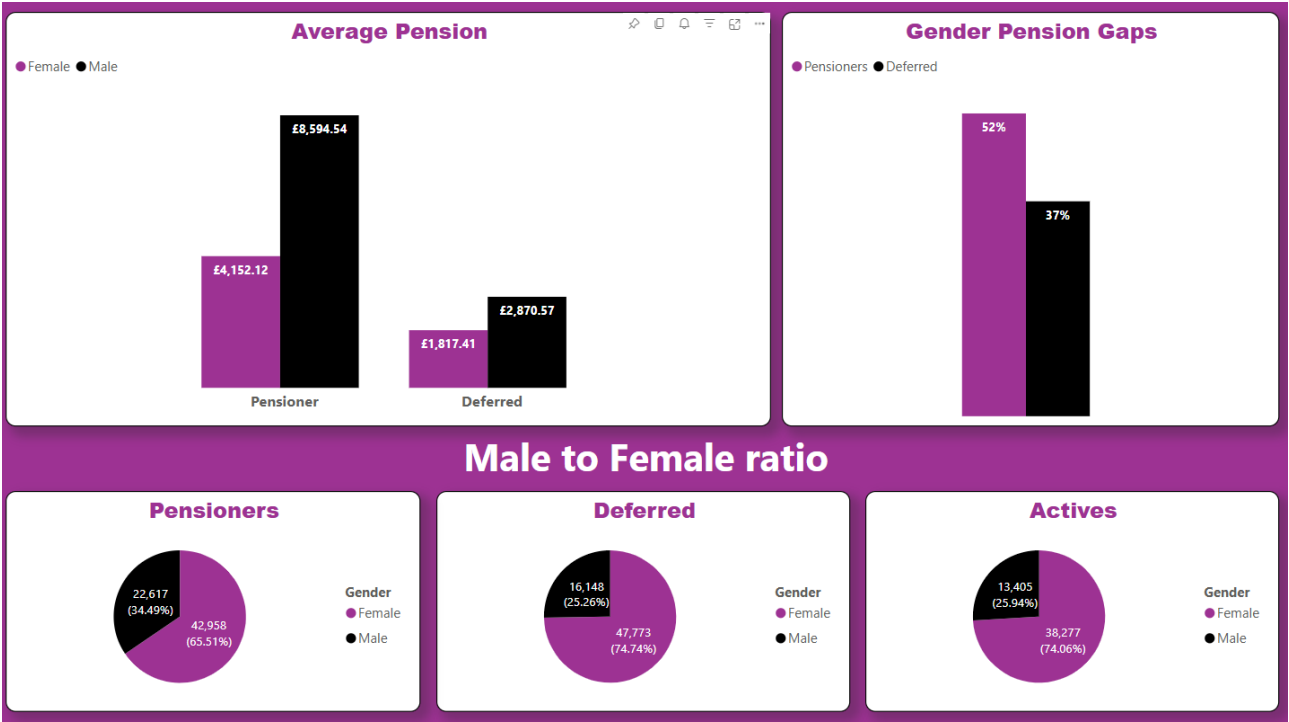
Deferred

- Deferred
- Unprocessed Leaver
- Deferred Ex Spouse
- Orphan AVC Only
- Pensioner Deferred

11,660 (18.08%)   3 (0%)

52,715 (81.73%)

Deferred 64,499

Pensioners

- Pensioner
- Beneficiary Pensioner
- Pensioner Ex Spouse

7,934 (12.39%)

55,981 (87.43%)

Pensioners 64,031

Preserved Refunds 13,480

Data Cut:
10 July 2024

Membership Split

- Active
- Deferred
- Pensioners

64,031 (35.67%)   50,983 (28.4%)

64,499 (35.93%)

*Preserved refunds not included

Membership Age Profile

Age Profile: - 16 | 16 - 29 | 30 - 44 | 45 - 54 | 55 - 64 | 65 + | Other

Pensioner: 156, 244, 91, 307, 11,728, 53,048

Deferred: 2,383, 21,112, 20,213, 18,410, 1,803

Active: 6,178, 16,557, 13,054, 13,730, 2,163

Overseas Membership

Preserved Refund 17 (1.56%)

Deferred 416 (38.1%)

Pensioner 658 (60.26%)

Active Members

75	46	17
Oldest	Average Age	Youngest

Pensioners

106	72
Oldest	Average Age

60	£5,390
Average Retirement	Average Pension

Deferred Members

84	48	18
Oldest	Average Age	Youngest

Average Pension

● Female ● Male

- Pensioner: Female £4,152.12 / Male £8,594.54
- Deferred: Female £1,817.41 / Male £2,870.57

Gender Pension Gaps

● Pensioners ● Deferred

- 52%
- 37%

Male to Female ratio

Pensioners

Gender
● Female
● Male

- 22,617 (34.49%)
- 42,958 (65.51%)

Deferred

Gender
● Female
● Male

- 16,148 (25.26%)
- 47,773 (74.74%)

Actives

Gender
● Female
● Male

- 13,405 (25.94%)
- 38,277 (74.06%)

Casework Processing

This section of the report deals with the level of casework processing activity being undertaken and performance against agreed targets. The team have processed 67% of the backlog. Overtime was restricted in February and March. A new plan is being drawn up to tackle the remaining 33% of backlog cases. This is covered further later in this report.

Casework processed within target for the year to date was 61%. The same as at the end of the previous end of quarter year to date. Across the year the team have completed just over 103,000 cases. This is an increase of just under 15% on the number completed in 2023/24 of 90,000. The team now have case rejection data available to them which highlights areas where Pension Officers may need additional/refresher training on certain tasks.

The Service Manager for the Benefits team left the Authority in the middle of February. David McClure was appointed to the role from 1 April. David is now working closely with the Assistant Director Pensions, on improving the reporting of statistics for this team. And from this an objective is to improve the number processed within target. He is assessing the timescales built into the processes to ensure data is accurate and robust. From quarter 1 2025/26 it is hoped that we can provide greater assurance to the Board of not just the totals of processes completed but a clearer breakdown of the areas of work processed within time against those not. Clearing the backlog will still negatively affect the number done within target though.
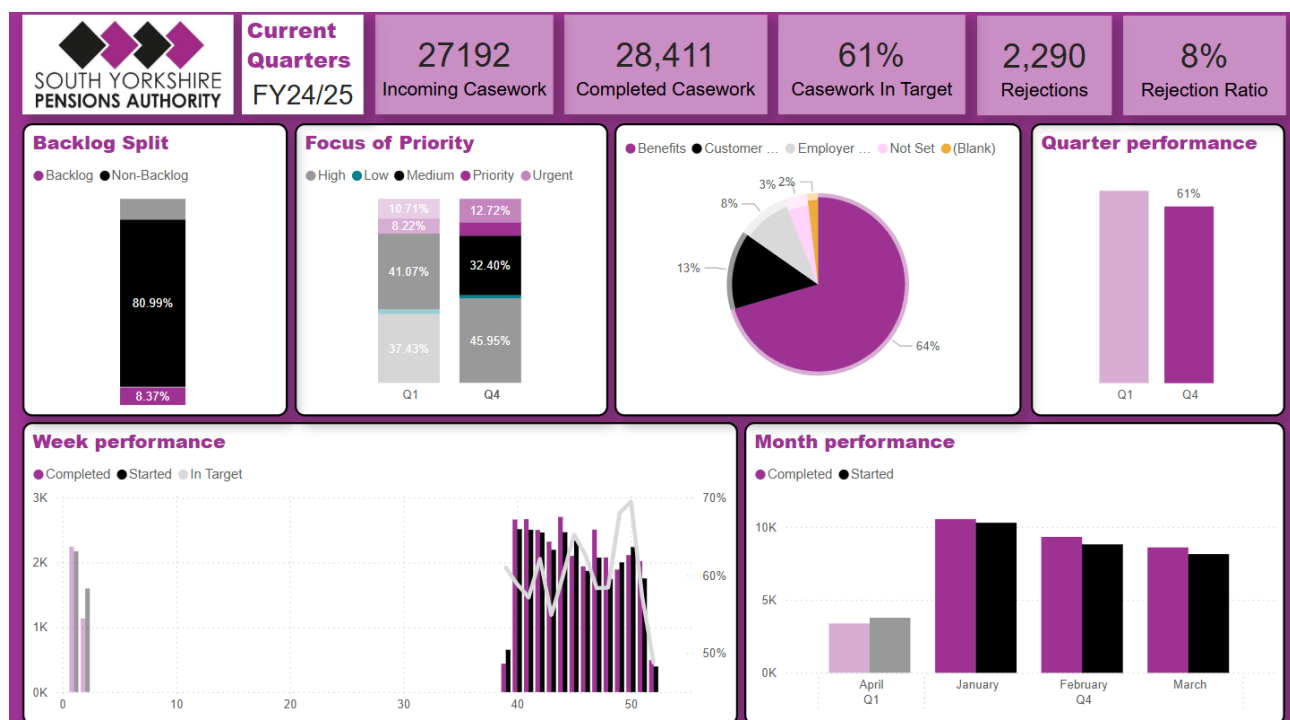
Early thoughts are that the Board would be interested in perhaps a breakdown of processes within and out of time. However, the number of processes is too large to show all of them. Investigations as to how to determine what to show are ongoing. This shows the detail held.

| Process Name	Priority	SYPA Target	Total Started	Total Complete	Variance	In Target	In Target (%)	Rejected Casework	Expected Complete In Target	Target Shortfall
Deferred Retirement Payment - Has Not Registered	Priority	5	269	249	-20	214	86%	40	100%	14%
Deferred Retirement Payment - Submitted Online	Priority	5	219	176	-43	148	84%	33	100%	16%
Deferred Retirement Quote - Has Not Registered	Urgent	5	375	363	-12	290	80%	58	100%	20%
Interfund In Quote	High	10	306	209	-97	141	67%	17	100%	33%
LG Change Personal Circumstances	Admin	5	1,436	1,408	-28	1,376	98%	56	100%	2%
LG Death Grant Payment	Priority	5	46	46	0	34	74%	9	100%	26%
LG Death in Deferment	Priority	5	72	30	-42	6	20%	6	100%	80%
LG Death in Service	Priority	5	18	16	-2	1	6%	5	100%	94%
LG Deferment	Medium	20	1,863	2,958	1095	823	28%	635	100%	72%
LG Divorce Quote	Urgent	10	78	78	0	74	95%	5	100%	5%
LG Divorce Settlement	Urgent	10	7	4	-3	4	100%	0	100%	0%
LG Interfund In - Original	High	10		63	63	13	21%	17	100%	79%
LG Interfund Transfer Out	High	5	126	115	-11	37	32%	24	100%	68%
LG Provisional Quote	Medium	5	314	295	-19	248	84%	36	100%	16%
LG Provisional Quote - Employer	Medium	5	105	102	-3	84	82%	14	100%	18%
LG Recalculation of Retirement Benefits	Medium	6	264	64	-200	14	22%	4	100%	78%
LG Refund	Medium	9	198	168	-30	141	84%	20	100%	16%
LG Retirement	Priority	5	369	344	-25	265	77%	53	100%	23%
LG Retirement Quote	Urgent	5	360	374	14	373	100%	35	100%	0%
LG Transfer In	Urgent	5	59	59	0	22	37%	7	100%	63%
LG Transfer Out	Urgent	5	29	21	-8	4	19%	10	100%	81%
LG Transfer Out Quote	Urgent	10	208	209	1	138	66%	38	100%	34%
Total			**6,721**	**7,351**	**630**	**4,450**	**61%**	**1122**	**100%**	**39%**

Customer Feedback

The Authority carries out rolling surveys of customer satisfaction. These can highlight areas for improvements across the teams.

Customer Satisfaction – Retirement Survey & Customer Centre Phone Calls – November 2024 to January 2025

Retirement Survey sent to **516** members with an email address. Of those **85** responded (16%).

Customer Centre Phone Survey sent to **3,259** members with an email address. Of those **207** responded (6%).
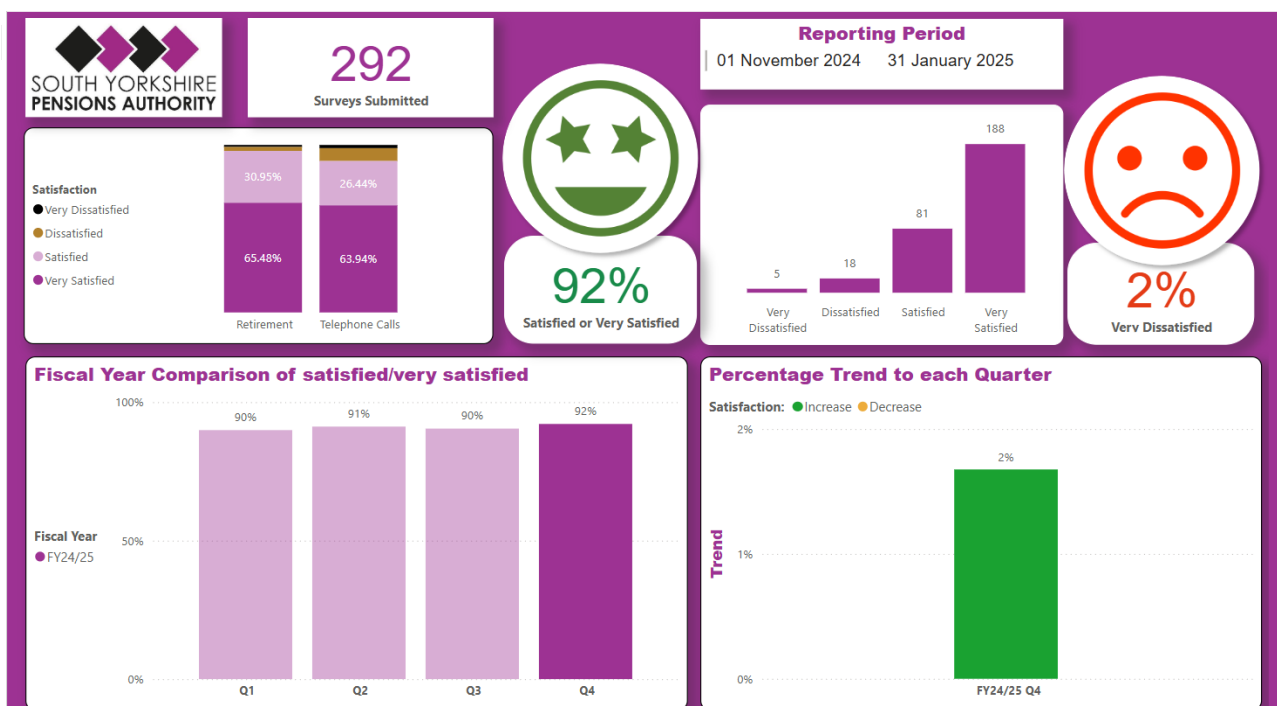
Most comments received were individual to those members. However, the comments below were noted from the retirement survey.

- Before retiring I would've liked more information about pensions, sessions were held during work time and due to how busy my role was I was unable to attend.

- I was unable to set out my cash lump sum to a specific pension payment, also payment isn't as noted on last Friday of Month, which hinders my direct debit and other payment bills.

Team Actions

- To accommodate as many members as possible, sessions are now offered from 5:30pm to 6:30pm. Recordings of these sessions are available online. Daytime sessions, due to low attendance have shifted to later in the afternoon.

- The online retirement process has now been integrated with the LGA lump sum calculator, providing users with a seamless experience when planning their retirement finances. Regarding pension payments, these are processed on the last banking day of each month not a Friday, and this is clearly communicated in all materials and updates to avoid any confusion.

Scheme Member Engagement – New Joiner Survey – September - November 2024

2,114 members were surveyed. The survey specifically asks about the welcome email/letter, including registration of the online portal. 37 completed surveys received. Just under 1.5% response rate.
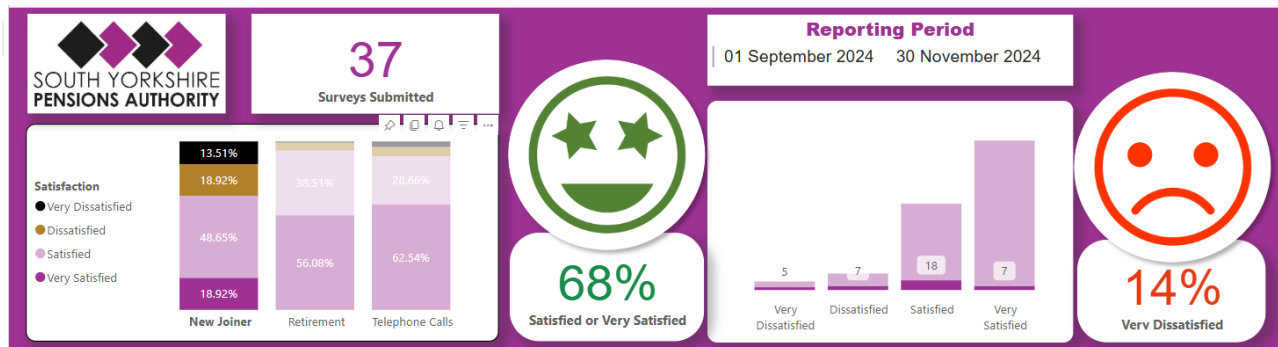
Comments from the Survey:
- Website runs very slow.
- Would like more regular updates on progress of my transfer from previous lgps employer. I did get a reply when I submitted an enquiry but concerned I've been with new employer for over 4 months and don't yet know my benefits.

Team Actions
- A website survey will go live this week to obtain further feedback to drive improvements.
- Mypension does offer the facility to "track my case" but we need to look carefully at what this feature offers in terms of value for money.

Scheme Member Engagement – Customer Centre Emails

Customer Centre Emails – "click face" Survey November to January 2025.

Q. Overall, how satisfied are you with the service you receive from us?		Compared to last quarter	
Excellent	52%	Down 1%	▼
Good	16%		
Ok	18%	Up 1%	▲
Poor	14%		
Total Number of Respondents	119 out of 14,217 emails issued		

Comments left from members who rated the service as poor:

- Member was unhappy with process to release deferred benefits – **solution** arranged for a trivial commutation quote and liaised with him through process to payment.

- Member unhappy at online account access – **solution** telephoned member and arranged an online face to face appointment to go through members Annual Benefit Statement.

- Member unhappy that they had not received a response to their query chasing interfund out – **solution** located the message via historical search and chased processing with the Benefits Team. Payment made within 2 weeks of query.

Team Actions

All members who rate the service poor and leave their contact details, are contacted and offered help to resolve any issues.

Processes Completed by the Customer Centre

Completed	In Time		Out of Time		Total	
	Nov to Jan 25	Aug to Oct 24	**Nov to Jan 25**	Aug - Oct 24	**Nov to Jan 25**	Aug - Oct 24
Total Processes	**6,897**	5,918	**1,819**	2,198	**8,612**	8,116

83.91% of processes completed in time for the period November to January 2025.

Member Engagement – online portal
All scheme members (regardless of status) are encouraged to sign up to the online portal. There was a total of 1,203 new registrations in the quarter to the end of March 2025.

	31.03.24	Registrations to 31 March 2025	% increase
Active	32,588	33,818	3.77%
Deferred	33,908	35,652	5.14%
Pensioner + Beneficiary	26,704	30,766	15.21%
Total	**93,200**	**100,236**	**7.54%**

Appeals Breaches and Complaints

The Authority deals with a number of appeals, breaches & complaints each quarter. Below is a summary of the cases that have been dealt with or that are currently outstanding. The on-going column includes any appeals that are still been investigated from previous quarters.

Appeals

3 General Appeals were raised with the authority. 1 stage 1, 1 stage 2. 4 general appeals were closed (2 from previous quarters & 1 from this quarter). One Stage 2 appeal was upheld and 2 Stage 2 appeals were not upheld. The stage 1 appeal was in relation to a member receiving an incorrect retirement quote. The stage 2 appeal that was upheld was regarding an error with the transfer of a members AVC funds.

Stage	B/F	Received	Rejected	Upheld	Not Upheld	On-going
1	0	3	0	1	2	0
2	0	0	0	0	0	0
Total	0	3	0	1	2	0

Ill-Health Appeals: 8 (11 as 2 members with multiple records) New Ill-Health appeals were raised. These are generally in relation to the level of ill health pension awarded by the employer. Stage 1 appeals in relation to ill health. 7cases are ongoing but well withing the response deadline of 2 months.

Stage	B/F	Received	Rejected	Upheld	Not Upheld	On-going
1	0	0	0	0	0	0
2	3	8	0	4	0	7
Total	3	8	0	0	0	7

Breaches:

Type	Contributions	Breaches of Law
Late Payment of Refund	3	0
AVC not paid at the same time as main scheme	0	11
Total	3	11

What is a breach?
A breach of the law is when a legal duty which is relevant to the administration of the scheme has not been, or is not being, complied with. It can encompass many aspects of the management and administration of the scheme, including failure to do anything required under overriding legislation, applicable statutory guidance or codes of practice. Examples include but are not restricted to;
• Failure to maintain accurate records.
• Failure to act on any fraudulent act or omission that is identified.
• Failure of an employer to pay over member and employer contributions on time.

• Failure to pay member benefits either accurately or in a timely manner.
• Failure to issue annual benefit statements on time or non-compliance with the Regulator's General Code of Practice.

Non-compliance with the Local Government Pension Scheme (LGPS) regulations can encompass many aspects of the management and administration of the scheme, including failure:
• To abide with the LGPS Regulations.
• To comply with the Funds policies and procedures (e.g. the Funds Statement of Investment Principles, Funding Strategy Statement, Administration Strategy or Communications Policy).

Who is responsible for reporting breaches?
The following are responsibility to report breaches (known as Reporters):
• Members of the Authority.
• Members of the Local Pension Board.
• Any person who is otherwise involved in the administration of the scheme: including all officers of the Authority.
• All participating employers in the scheme.
• Professional advisers: including auditors, actuaries, legal advisers and fund managers
• Any other person otherwise involved in advising the managers of the scheme.
Reporters are required to take a pro-active approach to the identification, management and reporting of all breaches that have occurred, or are likely to occur.

Complaints

The new Complaints' Resolution Officer role commenced in November 2024 and new processes for complaints' handling were introduced this over this quarter. The increased figures are reflective of capturing all complaints' data correctly. No trends to report with regards to the 17 complaints recorded this quarter. 7 cases were identified where the Authority could have given members a better service. Of those, 71% related to processing delays and 19% related to system errors.

Type	Scheme Rules	Employer	SYPA	Previous Fund	Member	Total
Retirement	1	1	1			**3**
Service			1			**1**
Transfer	3		1			**4**
Other	2		4		3	**9**
Total	**6**	**1**	**7**	**0**	**3**	**17**
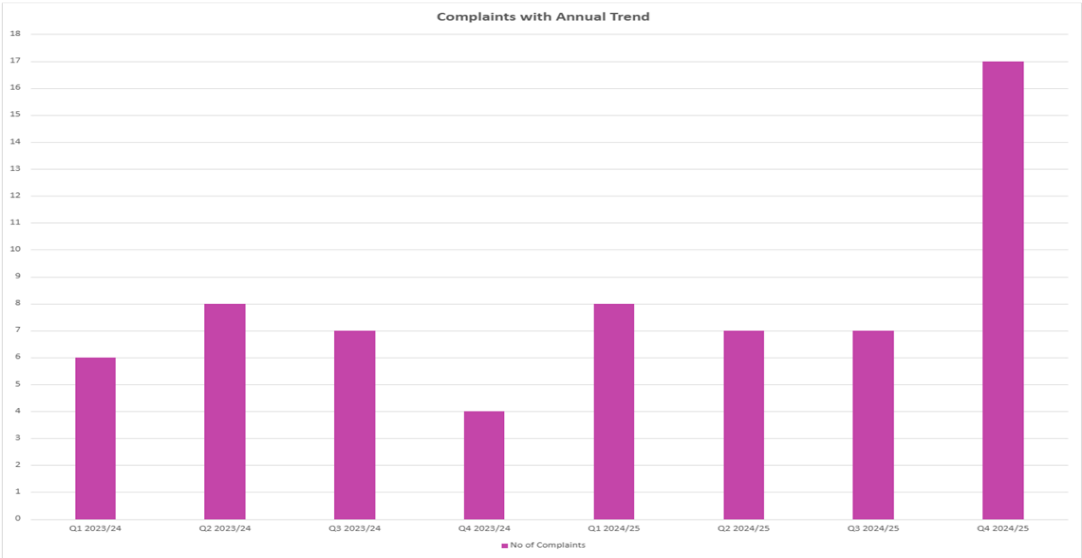
Pension Ombudsman Cases

Decisions awaited on the cases raised during previous quarters. The 1 case determined on was not upheld.

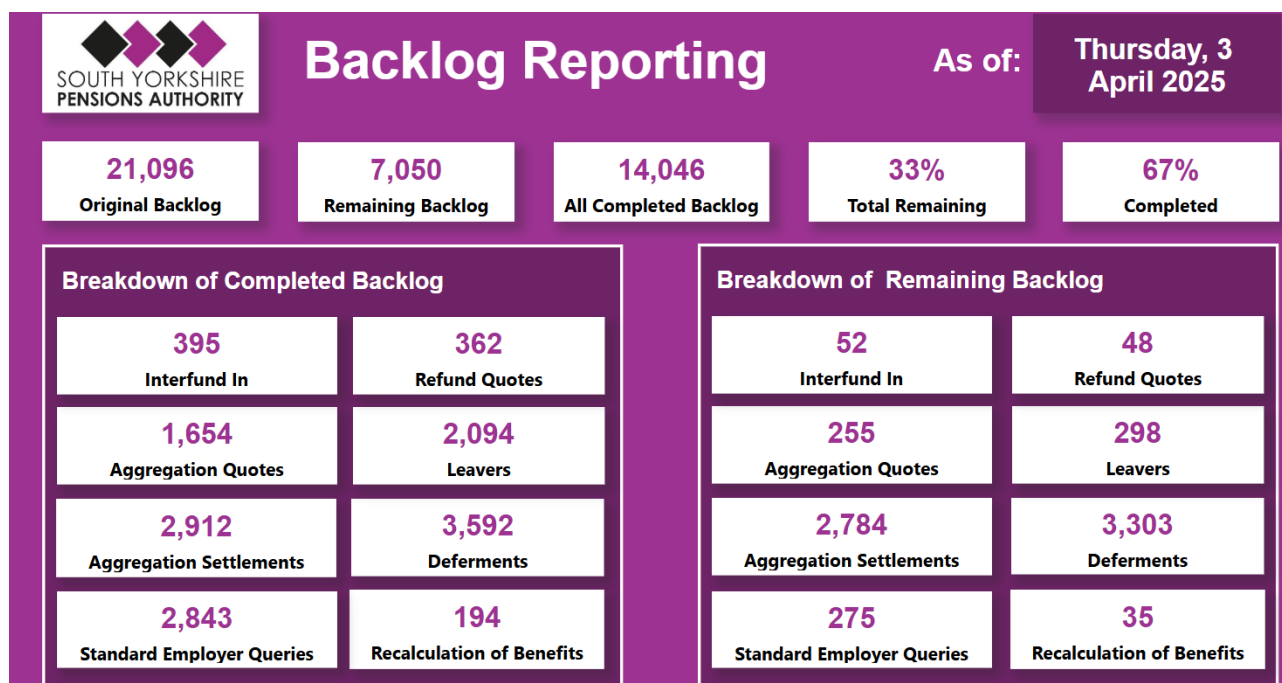| Awaiting Decision	Cases Decided On
1	1

Progress on Delivering the Administration Improvement Plan

This section of the report deals with the progress being made on addressing the historical challenges facing the administration service. Some improvements are reported on under major projects.

Backlog

Due to work required for pensions increase and withdrawing overtime in the short-term little progress was made on clearing the backlog.

There has also been a change in staff. The new Benefits Service Manager is working with the Assistant Director Pensions to refocus the work of this team. Investigations are underway to investigate the usefulness of an internal taskforce team to clear the backlog.

Backlog Reporting

SOUTH YORKSHIRE PENSIONS AUTHORITY

As of: **Thursday, 3 April 2025**

21,096	7,050	14,046	33%	67%
Original Backlog	Remaining Backlog	All Completed Backlog	Total Remaining	Completed

Breakdown of Completed Backlog

395	362
Interfund In	Refund Quotes
1,654	2,094
Aggregation Quotes	Leavers
2,912	3,592
Aggregation Settlements	Deferments
2,843	194
Standard Employer Queries	Recalculation of Benefits

Breakdown of Remaining Backlog

52	48
Interfund In	Refund Quotes
255	298
Aggregation Quotes	Leavers
2,784	3,303
Aggregation Settlements	Deferments
275	35
Standard Employer Queries	Recalculation of Benefits

Process Improvements

This project has now been delivered. The team have identified the next process to be improved and this work is to be embedded as business as usual going forward with a programme of improvements to be introduced over the year. Closed as complete.

Organisational Improvements

Closed as complete.

Making Best Use of Technology

A steering group is meeting quarterly to decide on the Pension Administration system developments and improvements to be taken forward for the following quarter. Release dates and guides are being discussed within the group which is ensuring all teams are more aware of developments being introduced and able to update teams on the changes to the system that may affect their day-to-day work.
A working group is looking at automation within the software at present.

It was reported that the Authority had not paid the supplemental pension increase due each year on retirement grants paid within the previous 12 months of the Pensions Increase date since 2017. This has now been undertaken and all members affected have received the money due. The supplemental increase due for the 2025 Pensions Increase will be processed in April.

There are still concerns about the capacity within Civica, the administration software provider, to deliver developments required. Please see the update on the McCloud project for further detail.

Improve Data quality.

Keeping and maintaining high quality data has become increasingly challenging over time due to the continual diversification of the employer base, increasing numbers of scheme members, employers using external payroll providers and the complexity inherent in the scheme's design. However, the Authority is committed to meeting these challenges and is to introduce a Data Quality Policy. See **Appendix 2**. A document showing the monitoring and reviewing of data that is undertaken across the year to improve data quality is attached at **Appendix 3**.

As the Authority is continually monitoring data quality individual data improvement plans are put in place for separate activities, including end of year data cleansing, queries arising from the valuation and Pensions Dashboards. The inhouse data reporting tool DART is used to help monitor the presence, quality and format of data and this helps determine further steps needed as part of specific data improvement activities.

Based on the output of the data reporting tool a high-level data improvement plan will be put in place setting out the overall data improvement activities relating to all areas of fund business should it be required to support with oversight and monitoring of progress.

Major Projects

This section of the report deals with the progress being made on the various major projects with the service is undertaking in particular:

McCloud

Members will recall that some functionality changes resulting from the McCloud remedy have already been delivered to date, which allows the Authority to implement the calculation of the new underpin for:
• Retirement of active members aged under 65; and
• Calculation of deferred benefits for members under age 65.
All remaining functionality, including that required to process all leavers using the new underpin, and to allow the possible rectification of casework which has been processed since 1 April 2014, was due to be delivered in two further tranches, the first in October 2024 and the second in January 2025.

To date these developments are still to be delivered. Civica have released revised dates and a revised plan is at **Appendix 4.**

As this is the valuation year it seems unlikely that the Fund can meet the 31 August 2025 deadlines for the McCloud remedy and as such, we will need to make MHCLG aware of the position and report ourself to the Pensions Regulator as this would represent a breach of the law.

Civica have provided this statement on the issues;

The McCloud ruling has led to a challenging and complex implementation of the resulting software changes to our pensions system, UPM. This has not been helped by amendments in guidance at points throughout the project which has impacted the scope and delivery timescales.
Civica is aware that clients have 3 main objectives to meet:
• Apply the new McCloud underpin to leavers.
• Rectify all casework since 2014.
• Add the McCloud underpin detail to all annual benefit statements.

Whilst some progress has been made in all areas, Civica understands that clients are required to meet a Legislative deadline to include the McCloud Underpin in the production of Annual Benefit Statements and issue them by 31 August 2025. Ideally, the project would have been phased to deliver the functionality in its entirety earlier and we are aware that our current projected delivery timescales will provide a challenge to clients in meeting the August deadline. Civica is looking at all reasonable measures to accelerate our project delivery and is also considering how we can help clients in their discussions with the various Regulatory bodies. Further information on the progress of the project will be shared on Tuesday 4th March and our new interactive delivery plan will be available to allow you to track progress more closely.

As the Board are aware, the Authority needs to develop a detailed implementation and rectification plan to manage the work required. Production of a plan is still delayed until the Authority has the remaining administration system functionality to be in place.

Dashboards

Training on Pensions Dashboards was covered on the Members training day on 28 November 2024.

Pensions Dashboards will enable individuals to access their pensions information online, securely, all in one place, thereby supporting better planning for retirement and reuniting lost pensions with their owner. The Pensions Dashboard includes information on their State Pension, current and historic pension schemes plus AVCs.

The Money and Pensions Service (MaPS) is developing and hosting its own Pension Dashboard on behalf of Government. MaPS set up the Pensions Dashboard Programme (PDP) to develop and deliver this. Longer term, commercial companies will be allowed to set up and run their own Pensions Dashboard. The Department for Work and Pensions (DWP) has set out a staged timetable for schemes to connect to the dashboard digital architecture. LGPS connection date is October 2025.

Scheme managers need to connect with and supply pensions information to savers through dashboards. This duty is outlined in the Pensions Dashboards Regulations 2022. DWP/MaPS and the PDP have made some significant changes due to the National Audit Office (NAO) primary findings that there was a lack of resources, with the necessary skills and experience, across all levels of the PDP and the governance was not robust enough to enable effective decision-making.

The changes to the PDP programme that DWP made, following the programme reset, are underway nationally now. PDP have issued new Data Standards, Reporting Standards and Connection Guide. There has also been a new digital identity provider procured to provide citizen identity checks. The Authority has contracted Civica to connect the Authority to the Dashboards, our ISP provider. The main change has been to what data can be verified by the new digital identity provider. The data fields have been reduced in number and therefor simplified the options open to the Authority to use as matching criteria.

An onsite visit is currently being arranged to appraise options and agree matching criteria with Civica. Once agreed the Authority will require a matching policy that will be reported to Board.

No commercial Pension Dashboards will be made available to the public until after MoneyHelper, the DWP/PDP Pension Dashboard, is launched.

Before becoming an approved ISP, all such providers are required to go through a 'beta' testing phase managed by the PDP and be officially signed off by the national programme. This sign off process is now being referred to as the 'volunteer' phase. Civica commenced their volunteer phase in December 2024 but have not been provided with a definitive deadline for when they will be officially signed off as an ISP, although it is expected that the process will conclude this month. That means the first Civica ISP client will not be able to 'onboard' until May 2025 at the earliest.

The national deadline for all dashboards to have gone live, as set out in regulations, is 31 October 2026.

Given the relatively short timeframe between May and the onboarding date of October there is little time available should any issues be encountered with the onboarding process. The Pensions Dashboard Programme recognise these delays in the ISP sign off are beyond the Fund's control and have stated provided their ISP are in the 'volunteer' phase, Funds will not need to find an alternative way to connect to the dashboards by the October 2025 deadline.

In the meantime, the Authority is working with our ISP on preparatory work required for dashboards and focussing on data cleansing.

The Authority will need to assess the quality of the data required to support the dashboard programme and cleanse any records as necessary ahead of our onboarding deadline. This cannot

start until the matching criteria is agreed with the ISP. Once matching criteria is agreed with Civica next steps will include loading and testing anonymised data into their cloud.

It is difficult to undertake any impact analysis of work/call levels at present, but these should be reduced now it has been formally confirmed that commercial dashboards will not launch at the same time as the national provision.

AVCs, which the Authority has 3 providers, must be shown on the Dashboards too. The Authority is engaging with the 3 providers on how this will work with each of them. Discussions are progressing and a multiple source route is being progressed following dialogue with 2 of the AVC providers. This allows the AVC provider to both provide data to the PDP dashboard and resolve queries. The remaining provider has stated they will not be connecting to the dashboard and insist on providing data to the fund to then share with our own data.

This has been an exceptionally busy period for this project from a practical and operational perspective and we are where we need to be at this point. The next steps will be to review and formally sign off the matching criteria. Actions completed and still outstanding are;

Governance	• Dashboards a standing item on Board Agenda	√
	• Board adequately trained on Dashboards requirements	√
	• DPIA updated to take account of matching criteria	
Policy	• Matching criteria agreed	√
	• Data Improvement in place	√
	• Backlog clearance plan in place for unprocessed benefits	
Connection	• ISP selected and formally appointed	√
	• Connection timeline agreed with ISP	
	• AVC – all decision agreed with providers	
Record-Keeping Decisions	• ISP selection process and rationale documented and parties communicated with	√
	• The main scheme and AVC matching criteria Policies in place	
	• All data cleansed	
Communications	• Early communication to members to raise awareness of Dashboards	√
	• Update communication strategy to reflect Dashboards	
	• All relevant stakeholders aware of their responsibilities	√
Data	• Assessment of quality and digital accessibility of the data undertaken	
	• Regular data cleansing scheduled; prioritising data most likely to be used for matching criteria	√
	• Main scheme view data requirements that must be returned understood together with timescales	√

Cyclical Activity

This section focuses on progress with significant cyclical projects including:

Pensions Increase 2025

The outstanding piece of work to pay the supplemental Pensions Increase to pensioners previously reported to Board, has now all been cleared. This was achieved by the end of March 2025. The Authority had over 10,000 cases. This is a huge achievement by the team.

The 2025 Pensions Increase, which is 1.7%. CPI in September 2024, has been completed successfully for Pensioner and deferred members. Pensioners receive an increase from Monday the 7th April. This is explained on their P60 and in the April newsletter.

Valuation 2025

Plans are in place to deliver the 2025 Valuation. A training session covering the work to be undertaken by the team follows this meeting.
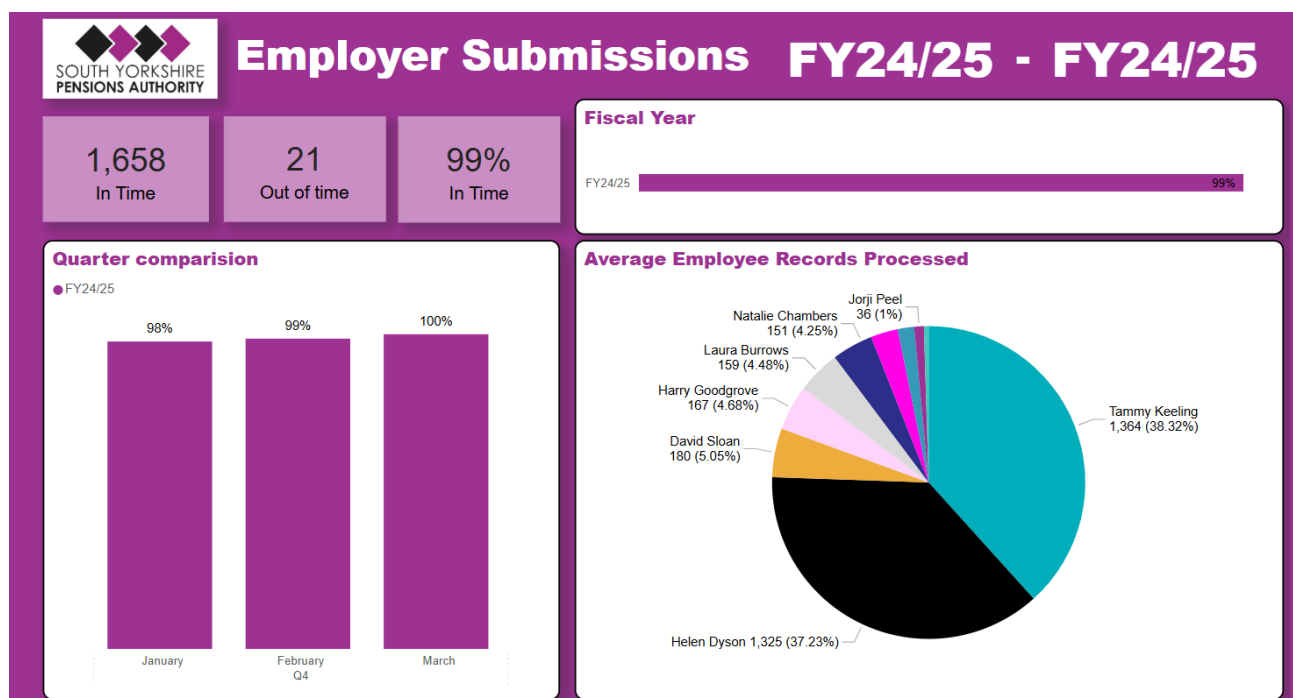
Employer Activity

Fund Employers

Employers as at 31 December 2024	565
Admissions: Schedule Bodies (6) Contractor TAB (6)	12
Cessations	2
Employers as at 31 March 2025	**575**

Timeliness of Employer data submissions

| Month	% of Monthly data submissions by deadline date
January	98%
February	99%
March	100%

The March submission deadline of 9 April was earlier than usual, due to Easter and the Direct Debit collection being the earlier date of 17 April. The March submission contains the salary information for the Annual Benefit Statements, and the Employers spend more time on these files making sure this information is accurate. To receive 100% on time in a Month is a huge achievement, but even more so with it being the March submission, and the team are extremely grateful to the Employers for uploading the files promptly. This is also the first time that ALL contributions have been collected by Direct Debit.

Employer performance - in dealing with queries

Being Valuation Year, clearing the outstanding Employer Queries has been one of the Employer Service Teams main objectives. This Graph shows that at Q1 24/25 there were 2,679 Queries outstanding and by the end of Q4 24/25 these have reduced to 897.
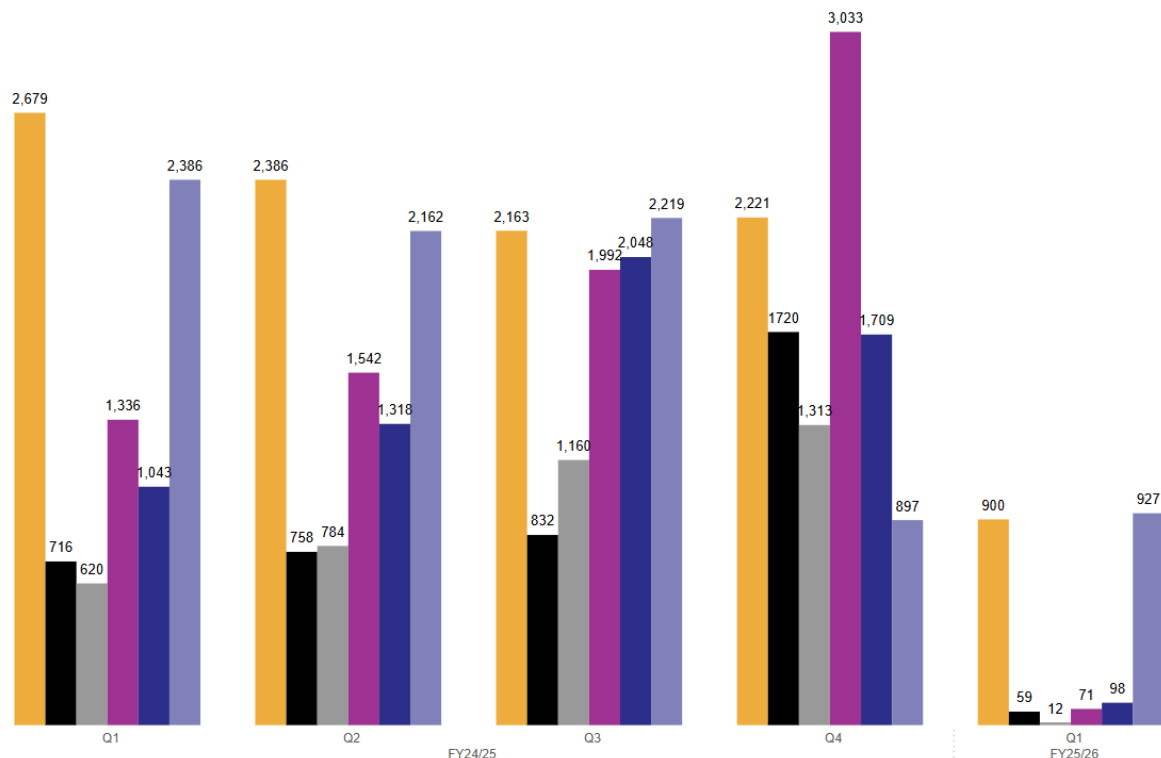
FY & Q	FY24/25 Q1				FY24/25 Q2				FY24/25 Q3				FY24/25 Q4			
Employer	Opening	Raised	Completed	Closing	Opening	Raised	Completed	Closing	Opening	Raised	Completed	Closing	Opening	Raised	Completed	Closing
Capita	108	21	23	106	106	50	36	120	120	73	33	160	160	74	139	95
[00600] Sheffield City Council	184	123	245	62	62	197	194	65	65	232	183	114	114	248	301	61
EPM	88	13	33	68	68	13	20	61	61	11	17	55	55	23	22	56
[00400] City of Doncaster Council (CDC)	50	83	101	32	32	117	92	57	57	159	145	71	71	146	188	29
[00500] Rotherham MBC	84	79	133	30	30	114	88	56	56	209	205	60	60	156	186	30
[00766] Abbeyfield Primary Academy	31		3	28	28	2	4	26	26	5	2	29	29	4	10	23
[00443] Conisbrough Ivanhoe Primary Academy	38	2	6	34	34	4	8	30	30	4	7	27	27	6	9	24
[00295] The Chief Constable	43	37	40	40	40	37	20	57	57	37	64	30	30	44	55	19
[00871] High Storrs School	21	5	2	24	24	4	7	21	21	7	7	21	21	2	5	18
[00758] Tinsley Meadows Primary Academy	40	3	13	30	30	4	7	27	27	4	8	23	23	7	13	17

Barnsley MBC is not showing on the Top 10 outstanding queries and shown separately below:

FY & Q	FY24/25 Q1				FY24/25 Q2				FY24/25 Q3				FY24/25 Q4			
Employer	Opening	Raised	Completed	Closing	Opening	Raised	Completed	Closing	Opening	Raised	Completed	Closing	Opening	Raised	Completed	Closing
[00300] Barnsley MBC	9	70	70	9	9	98	94	13	13	112	120	5	5	102	104	3

Current Improvements
- Employer Support Officers and Engagement Officers collaborations with Employers has resulted in improvements to accuracy of data in Monthly Submissions and uploading target improvements.
- The team holds regular meetings with large Employers/Payroll Providers to build rapport and ensure compliance.
- Introduced a Monthly Employer Newsletter – which has been well received.

- Improvements to Employer Query reporting
- New Employer and Member MDC Query Data Form developed to help monitor MDC queries and compliance. This will be used to identify training required and monitor MDC's.
- Employer Focus Group preparations for September have commenced.
- Employer Forum preparations for November have commenced.

Improvement Plan
- Improve the EPICi system – more workflows are planned.
- Creating a Bulk Redundancy request template for Employers which will automatically create figures for all members over age 55, using the MDC information on UPM.
- Request the Discretionary Policy from all Employers supported by training webinars on how to avoid "fettering".
- Preparations to update the Employer page of the SYPA website are underway with a view to switch off EPICe for Employers.
- Employer Hub (Phase 2) Project to commence in 2025/26 Q1 to produce self-service reports, easier to use Retirement Quote facility and improved maintenance to avoid breaches.

Training / Presentations delivered
- 36 Training Sessions
- 9 Employee Sessions
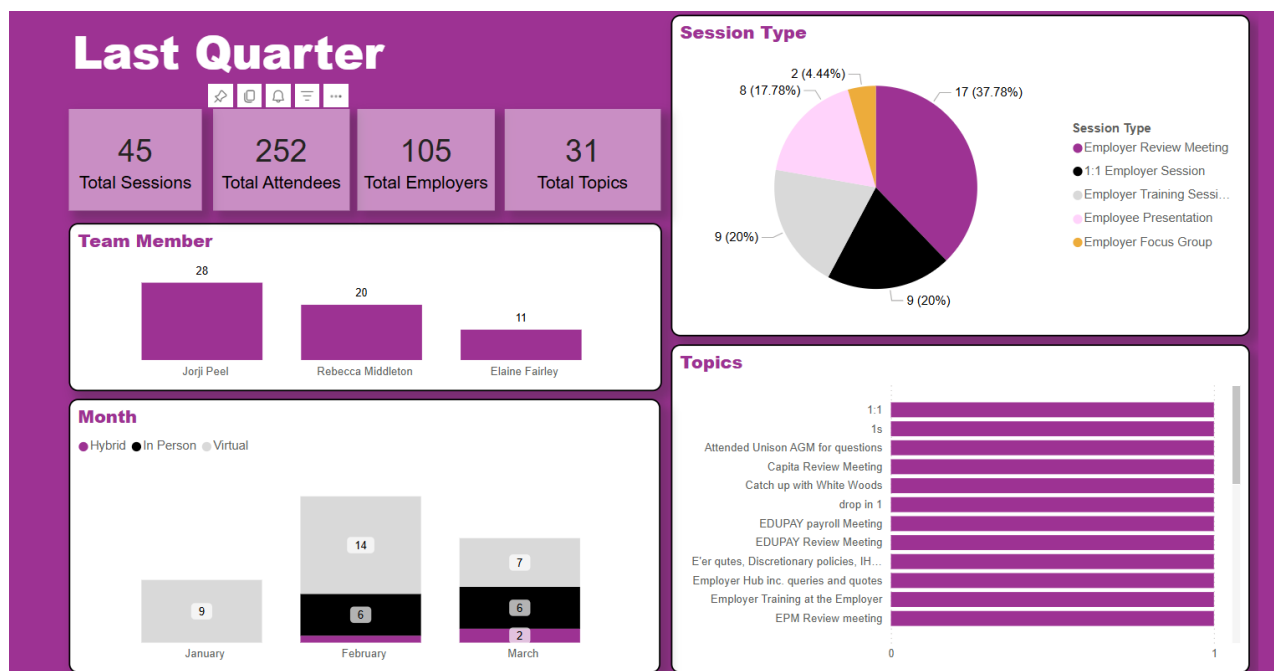
Policy Developments

This section of the report summarises recent policy developments and areas of interest.

MHCLG letter to administering authorities

On 10 March Michelle Warbis from MHCLG wrote a letter to LGPS administering authorities to signal the government's intention to consult on changes to Regulation 64(A). This is the regulation that permits funds to vary employer contributions between valuations under certain limited circumstances, including upon the request of an employer, so long as it is in line with the fund's published policy. Regulation 64(A)(2)(b) states that the administering authority must only "have regard to" the view of the actuary when reviewing the certificate. However, it is the actuary who is required to sign the certificate, and in doing so would have to be comfortable with its contents. Certain authorities have acted contra to their actuary's advice.

MHCLG's letter re-iterated previous guidance that contribution rates should not be reviewed outside the valuation cycle to manage pension scheme surpluses (or deficits) emerging between valuations. They are therefore going to consult on a change to the contribution rate review regulation.

Appendix 1 – Pension Acronyms

Pension Acronyms	
Acronym	**Meaning**
APCs	Additional Pension Contributions
AVC	Additional Voluntary Contribution
CARE	Career Average Revalued Earnings
CIPFA	Chartered Institute of Public Finance and Accountancy
CPI	Consumer Prices Index
FE	Further Education
FSS	Funding Strategy Statement
FY	Financial Year
GAD	Government Actuary Department
GMP	Guaranteed Minimum Pension
HMT	His Majesty's Treasury
IDRP	Internal Dispute Resolution Procedure
IFA	Independent Financial Advisor
IRMP	Independent Resgistered Medical Practiotioner
ISP	Integrated Service Provider - to support connection to Pens
LGPS	Local Government Pension Scheme
McCloud Remedy	Service since 01.04.2014 - 31.03.2022 must be recalculate present Scheme.
MDC	Monthly Data Collection
MHCLG	Ministry of Housing, Communities and Local Government
mypension	The member online portal where they can see their own pe
PI	Pensions Increase
RPI	Retail Price Index
SAB	Scheme Advisory Board
SEQ	Standard Employer Query
SLA	Service Level Agreements
TPO	The Pension Ombudsman
TPR	The Pension Regulator
Triennial Valuation	Every 3 years the Pension Fund undergoes a valuation
UPM	Universal Pension Management system