

# North Yorkshire Council

## Pension Fund Committee

6 March 2026

### Administration Report

#### Report of the Treasurer

#### 1. Purpose of the Report

1.1. To provide Members with information relating to the administration of the Fund in the quarter and to provide an update on key issues and initiatives which impact the administration team.

#### 2. Admission Agreements & New Academies

2.1. The latest position relating to admission agreements and academy conversions is shown in **Appendix 1**.

#### 3. Administration

##### 3.1. Membership Statistics

Membership Category	At 30/09/2025	+/- Change (%)	At 31/12/2025
Active	29,897	+2.25%	30,585
Deferred	38,520	-0.09%	38,486
Pensioner (incl spouse & dependant members)	34,153	+1.23%	34,578
<b>Total</b>	<b>102,570</b>		<b>103,649</b>

##### 3.2. Throughput Statistics

- Period from 1 October 2025 to 31 December 2025

Case type	Cases Outstanding at Start	New Cases	Cases Closed	Cases Outstanding at End
Transfer In quotes	6	28	26	8
Transfer Out quotes	26	126	137	15
Employer & employee estimates	131	700	629	202
Retirement quotes	50	439	448	41
Preserved benefits	1,471	4,104	3,816	1,759
Death in payment or in service	177	452	480	149
Refunds	120	326	291	155
Actual retirement procedure	585	851	1,036	400
Interfund transfers	673	1,180	1,053	800
Aggregate member records	67	326	306	87
Others	427	2,712	2,813	326
<b>Total Cases</b>	<b>3,733</b>	<b>11,244</b>	<b>11,035</b>	<b>3,942</b>

- As well as processing the above cases, the Pensions team also handled 1,773 phone calls (average 37 per working day) in the quarter.

### 3.3. Performance Statistics

- The performance figures for the period 1 October 2025 to 31 December 2025 are as follows:

Performance Indicator	Target in period	Achieved
Measured work completed within target	98%	96%
Customers surveyed ranking service good or excellent	94%	99%
Increase numbers of registered self-service users by 700 per quarter (total registered users 58,370)	700	1,541

- We continue to focus on completing all our work within target and encouraging sign up for member self-service.

### 3.4. Commendations and Complaints

- This quarter the following commendations and complaints were received:

#### Commendations

Date	Number	Summary
Oct	4	The team are superb Fantastic customer service
Nov	1	NYPF stands head and shoulders above everyone
Dec	1	Members of staff were knowledgeable, polite, friendly and professional

#### Complaints

Date	Number	Summary
Oct	2	Admin – complaint about reduction in benefits at retirement due to data being incorrect IHER – complaint against employer for declining ill health application
Nov	1	IHER – complaint about pay provided by the employer for pension calculation
Dec	0	

- The complaint categories are:
  - Admin - these can relate to errors in calculations, delays in processing and making payment of benefits.
  - Regs - these relate to a complaint where regulations prevent the member being able to do what they want to.
  - IHER - these are where members have been declined for early retirement on the grounds of ill health and are appealing the decision through the Internal Disputes Resolution Procedure.

#### Lessons Learned

Having reviewed the complaints received in the period there were no patterns identified requiring further attention. However, an audit and cleanse is underway to ensure any historic data that is used for calculation of CARE benefits is accurate.

### 3.5. **Annual Benefit Statements 2026**

Work has now finished on the 2025 annual benefit statement exercise, and we have commenced preparatory work for the 2026 exercise. Following the launch of the new member self-service portal in January the benefit statements will now be displayed on screen. Members can download a PDF version if they want and any member that wants a paper copy will continue to be provided with one.

### 3.6. **Breaches Log**

Included at **Appendix 2** is the North Yorkshire Pension Fund's Breaches Log for review. There are no new entries this quarter.

## 4. **Issues and Initiatives**

### 4.1. **Triennial Valuation**

The 2025 triennial valuation is nearing completion with the Actuary expected to provide the final valuation report and Rates and Adjustments Certificate within the next few days. Employers will be advised of the new rates and payments will be monitored to ensure they are being used.

### 4.2. **McCloud**

We are working through the rectification phase and have corrected 52 pensioner records to date with a further 193 to pay. These are being phased over a few months, so we have time to update records and add to payroll before each month's payroll cut-off date.

Once these are completed, we will start work on the rectification stage for deceased members and transfers out, of which there are 199 on the initial list.

### 4.3. **Regulation changes**

Several scheme changes are expected in the early part of this year following the Fit for the Future, Access and Fairness and Access and Protection consultations. As soon as we receive guidance from the Local Government Association, we will create a project team to identify the affected members and make the required changes to benefits.

## 5. **Member Training**

The Member training record showing the training undertaken up to the end of the relevant quarter is attached as **Appendix 3**.

Please contact David Smith on 01756 706235 or email [david.smith1@northyorks.gov.uk](mailto:david.smith1@northyorks.gov.uk) with any details of training undertaken or conferences attended, and these will be added to the training record.

Upcoming courses, seminars and conferences available to Members are set out in the schedule attached as **Appendix 4**.

Please contact the team on email [pensionfund@northyorks.gov.uk](mailto:pensionfund@northyorks.gov.uk) for further information or [DemocraticServices.Central@northyorks.gov.uk](mailto:DemocraticServices.Central@northyorks.gov.uk) or [david.smith1@northyorks.gov.uk](mailto:david.smith1@northyorks.gov.uk) to reserve a place on an event.

## 6. **Meeting Timetable**

The latest timetable for forthcoming meetings of the Committee is attached as **Appendix 5**.

## 7. **Recommendations**

8.1 Members to note the contents of the report.

8.2 Members to note the contents of the Breaches Log.

Gary Fielding  
Treasurer of North Yorkshire Pension Fund  
North Yorkshire Council  
County Hall  
Northallerton

24 February 2026