

North Yorkshire Council

Pension Fund Committee

22 May 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 31/12/2025	+/- Change (%)	At 31/03/2026
Active	30,585	+0.40%	30,708
Deferred	38,486	-0.52%	38,284
Pensioner (incl spouse & dependant members)	34,578	+1.13%	34,968
Total	103,649		103,960

3.2. Throughput Statistics

- Period from 1 January 2026 to 31 March 2026

Case type	Cases Outstanding at Start	New Cases	Cases Closed	Cases Outstanding at End
Transfer In quotes	8	22	28	2
Transfer Out quotes	15	228	217	26
Employer & employee estimates	202	970	969	203
Retirement quotes	41	405	403	43
Preserved benefits	1,759	1,092	1,625	1,226
Death in payment or in service	149	773	753	169
Refunds	155	414	329	240
Actual retirement procedure	400	1,384	1,240	544
Interfund transfers	800	871	911	760
Aggregate member records	87	388	344	131
Others	326	2,304	2,284	346
Total Cases	3,942	8,851	9,103	3,690

- As well as processing the above cases, the Pensions team also handled 3,072 phone calls (average 60 per working day) in the quarter.

3.3. Performance Statistics

- The performance figures for the period 1 January 2026 to 31 March 2026 are as follows:

Performance Indicator	Target in period	Achieved
Measured work completed within target	98%	94%
Customers surveyed ranking service good or excellent	94%	95%
Increase numbers of registered self-service users by 700 per quarter (total registered users 16,455)	700	16,455

- We continue to focus on completing all our work within target and encouraging sign up for member self-service.
- The number of self-service registered users was reset to zero when the new platform went live on 16 January 2026. We are undertaking a number of campaigns to encourage members to re-register for the new platform.

3.4. Commendations and Complaints

- This quarter the following commendations and complaints were received:

Commendations

Date	Number	Summary
Jan	3	Exceptional service Professional
Feb	2	Extremely patient and helpful
Mar	1	Patience, kindness and understanding

Complaints

Date	Number	Summary
Jan	2	Admin – complaint about having to provide documentary evidence to change gender on pension record Regs – complaint about tier 3 ill health only being uplifted to a tier 2
Feb	0	
Mar	1	IHER – complaint against employer for declining ill health application

- 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. We have however, amended our processes for gender reassignment cases.

3.5. **Annual Benefit Statements 2026**

The preparatory work continues. Data has been received from 158 employers with 30 outstanding. These are being chased regularly.

A workshop was held in April with templates and processes reviewed and amended where required. Checking and testing work continues.

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. **McCloud**

Pensioners continue to be processed with 161 already paid, 44 to pay in May and the final 33 to be paid in June. Work has now commenced on the final stage for deceased members and transfers out, of which there are 199 on the initial list.

4.2. **Regulation changes**

Work has begun on the regulation changes introduced by the Fit for the Future, Access and Fairness and Access and Protection changes. Each introduces a significant amount of change across various aspects of the governance and administration of the Fund, and we continue to evaluate and quantify the impact and numbers affected by the changes.

Employers have been notified of the necessary changes resulting from the Access and Fairness regulatory amendments, which came into force on 1 April 2026 and have immediate effect on pension scheme members.

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 Christian Brennan on 01723 232332 or email christian.brennan@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 for further information or DemocraticServices.West@northyorks.gov.uk or christian.brennan@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

14 May 2026