

Nottinghamshire Pension Fund
Annual General Meeting

**Transforming pension administration
through digital development and new
ways of working update**

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- Pension Regulator has stipulated it expects Funds to enable scheme employers and members to interact via digital platforms
- Pension Committee approved the scope of the transforming pension administration through digital development and new ways of working in September 2019 and additional data work in September 2020.
- COVID 19 - highlighted the need to progress the move to digital pension services
 - Enabling scheme employers and members to self serve
 - Reduction in the need for hard copy documents and face to face contact



- **Data audit and improvement - key foundation**
- Phase 1 & 2 Data Audit and Forensic Analysis - complete
 - 430 data validation checks covering common & scheme specific data.
 - Checks run across 173,647 pension folder equals 134,496 members.
 - Forensic analysis now complete
- Phase 3 Data Resolution Phase – in progress
 - Over 500,000 data validation amendments identified
 - Of these over 140,000 already resolved through loading of 2019-2020 year end
 - Development and implementation of bulk data resolution underway
 - Requirement for interaction directly with Scheme Employers and individual members also required
- Phase 4 Data quality maintenance



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Data Improvement

- Currently Scheme Employers provide a year end return
- Provides the Fund with substantial additional information regarding members
 - New starters
 - Leaves
 - Changes – earnings/salaries, name and address changes
- Creates a significant peak of work
- Move to monthly returns will address this issue
- Other LGPS Funds already implemented and we are using their experience and learning to shape our plan
- Dependency with data improvement phase



- Phase is running in parallel with the Data Phase
- Secure portal for interactions between Employers and Fund
- Pilot with Nottinghamshire County Council is now complete, enables online submission of -
 - Death in Service
 - Ill health retirement
 - Flexible retirement
 - Limited view of their members records
 - Estimate requests -
- Next steps to rollout to four district and borough employers and two large educational employers
- Then rollout to all remaining employers.



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Scheme Employers Portal

- Originally proposed to scope the Members Portal during second half of 2020.
- Good quality data is key to the successful channel shift of members to online services
- Paramount that the Data Phase must be progressed significantly before the Members Portal can be developed

