



## **Teesside Pension Fund**

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# **Administration Report**

**February 2026**

## Pension Administration Report – Q3

This report provides an update on material matters in pensions administration and performance for Q3 up to 31 December 2025.

### 1. Introduction

On 1 June 2025, responsibility for the administration of the Teesside Pension Fund was successfully transferred from XPS Group to the Tyne and Wear Pension Fund (TWPF) as part of a shared service agreement. This transition, as previously reported, was not without its difficulties. A range of challenges emerged during the handover, notably several data-related issues that TWPF is now actively working to resolve. It is acknowledged and accepted that some errors may take several months to resolve.

Despite these initial hurdles, the transition has reached a stable phase. All new cases are currently being processed under standard business procedures, indicating a return to normal operations.

### 2. Pensions Processing

We are still determining the full extent of pension processing while addressing backlog cases, however the number of new cases has stabilised in the last quarter.

Appendix 1 provides a detailed report of the cases outstanding at the end of Quarter 3. Please be advised that the total number of cases is projected to increase in the next quarter, as we start to process 4,500 historical cases requiring benefit calculations to ensure their status is accurately updated.

### 3. Performance Against Statutory Requirements and Key Performance Indicators

TWPF measures the performance of the service against the Occupational and Personal Pension Scheme (Disclosure of Information) Regulations 2013 (“the Disclosure Regulations”), the national LGPS Scheme Advisory Board’s (SAB) Performance Indicators and additional internal performance indicators.

In respect of performance against disclosure, these are measured against 100%. Compliance with this is not always achievable, as there is reliance on employers to provide information and cases can be complex.

Appendix 2 sets out performance for Q3 (i.e. the period up to 31 December 2025).

It is a requirement to report the SAB KPIs in the Annual Report and Accounts. Appendix 3 shows performance against this set of KPIs up to 31 December 2025.

It is important to consider the overall circumstances of the transfer of responsibilities and the progress achieved since the start of the contract on 1 June 2025. It is expected that performance will improve as issues arising during the transition are resolved.

### 4. Online Member Services Registration

TWPF's default method of communication is digital, meaning that members will receive documents and updates electronically unless they specifically request to continue receiving paper correspondence. This brings significant efficiencies and cost savings.

Teesside Pension Fund members have been notified of this transition through various communications over the past year, ensuring that everyone is aware of the new approach.

The table below displays the number of members registered for online services, showing strong uptake in a short period. It is anticipated that these figures will increase further in the coming months as the Annual Pensioner Update and Annual Benefit Statements are released.

	Active		Deferred		Pensioner	
	Registered	%	Registered	%	Registered	%
<b>30/09/2025</b>	3,796	14%	1,775	9%	870	4%
<b>22/01/2026</b>	6,738	25%	3,347	17%	5,743	22%

## 5. Service Delivery

As previously reported, the transition of administration resulted in a significant increase in the volume of calls to the Pensions Helpline. During this period, there were weeks when only 40% of calls were successfully answered, indicating the heightened demand for support and guidance.

Encouragingly, by December, the situation had improved considerably, with 79% of calls being answered. This marked improvement demonstrates TWPF's ongoing efforts to respond effectively to member needs. Nevertheless, TWPF recognises the importance of providing a consistently high standard of service and remains committed to increasing this figure further. The goal is to ensure that all members receive excellent support and assistance whenever they contact the Pensions Helpline.

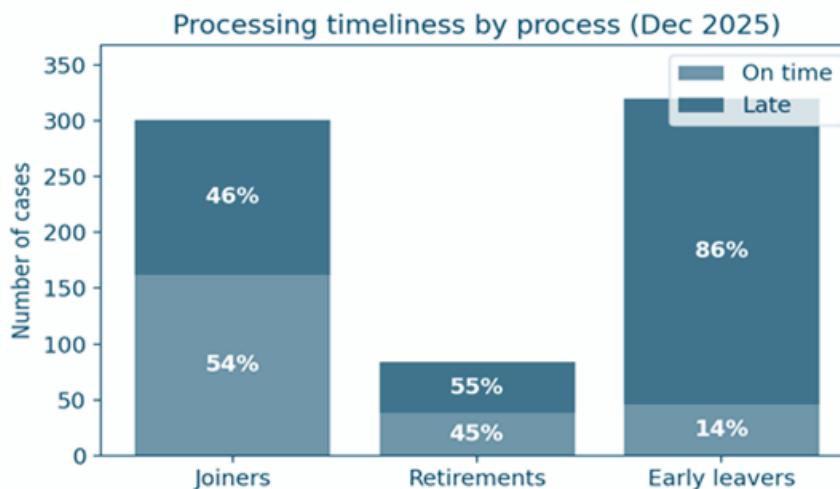
The table below illustrates the volume of calls received by the Pensions Helpline from 1 June 2025 onwards. As backlogs arising from the issues identified during the transition period are cleared, it is anticipated that calls will naturally reduce.

	June	July	August	September	October	November	December
All calls to the helpline	11946	8433	9353	8595	7244	8114	4965
<i>TOTAL calls to helpline (after option selection)</i>	8277	7030	7126	7225	6184	6978	3802
Average time to answer	00:15:24	00:08:48	00:14:20	00:07:44	00:05:52	00:05:55	00:03:51
Number of calls answered	3541	4299	3801	4983	4609	5014	3101
Average length of call	00:05:11	00:05:02	00:04:57	00:05:09	00:05:27	00:05:26	00:05:17
Abandoned calls after selection	4736	2731	3325	2242	1575	1964	701
Maximum delay to answer	01:31:46	00:59:27	01:19:33	00:54:36	00:50:49	00:49:16	00:40:56
% of calls answered	41.04%	58.34%	51.42%	68.41%	74.12%	71.33%	78.73%
Average abandoned time	00:04:14	00:03:29	00:04:13	00:03:14	00:03:29	00:02:41	00:02:45

It should be noted that the table above shows calls for both TPF and TWPF.

## 6. Employer Performance

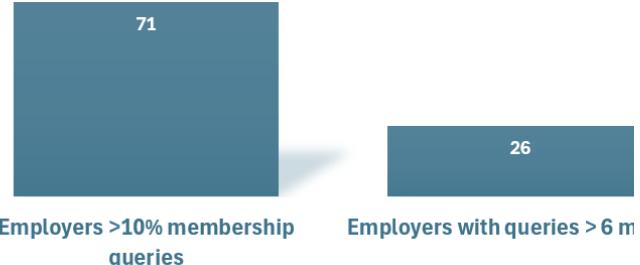
There is a statutory duty placed on employers to provide information regarding their members. TWPF relies heavily on this data to maintain accurate member records, calculate and pay benefits, and provide annual benefit statements. As a result, TWPF closely monitors the overall performance of employers and keeps track of any outstanding queries.



TWPF tracks employer performance to ensure prompt data submission. The graph to the left shows leavers forms received on time versus late during December 2025

TWPF routinely contacts employers to clarify information that has been submitted. The graph on the right illustrates the number of unresolved queries as at December. There are 71 employers with more than 10% of their membership under query, and 26 employers have queries that are older than six months.

### Outstanding employer queries (at Dec 2025)



The Employer Services Team will continue reviewing employers who reach trigger levels. It is acknowledged that there is a period of adjustment whilst employers familiarise themselves with new working practices. We are monitoring the situation whilst supporting employers. This support includes a dedicated employer helpline, training webinars and meetings where necessary.

## 7. Dashboards

Pensions Dashboards are a government-led initiative designed to give individuals a secure, online, platform to view all their pension information in one place, including LGPS benefits and other pension arrangements. The aim is to improve transparency, help members plan for retirement, and reduce the risk of lost pensions. For LGPS funds, this requires ensuring data accuracy, compliance with technical standards, and integration with the national dashboard infrastructure.

TWPF has appointed Civica, our pensions administration software provider, as our Integrated Service Provider (ISP). TPF have now proven the ability to connect to the dashboard, and TWPF is carrying out the first phase of testing to ensure the data matching criteria works. The date of live launch is yet to be announced, although a period of 6 months' notice is expected.

High-quality data and robust processes are essential to meet regulatory expectations and deliver a reliable service for members. The poor quality of Teesside member data is a notable problem and risk. While we have a plan to improve the Teesside member data, this may take a few years before data reaches a satisfactory standard.

## 8. Added Value

Although the terms of the contract were agreed upon and outlined during the procurement process, since going live on 1st June, TWPF has undertaken - and continues to undertake - a range of additional actions and tasks beyond the scope of the contract at no extra cost. Some of these activities relate to matters predating the commencement of the contract. This includes:

- Putting in place a plan to work with employers to resolve the historical backlog of undecided leavers which had built up prior to the commencement of the contract (starting with approximately 4,700 cases).
- Providing membership data to the Teesside Pension Fund's Actuary in respect of the 2025 valuation and dealing with resulting queries.
- Liaising with and providing information to Teesside Pension Fund Officers and the Auditors to help prepare and finalise the Annual Report and Accounts for 2024/25.
- Providing information to assist Teesside Pension Fund to determine and collect unpaid amounts from Teesside employers in respect of unfunded compensatory added years and strain on the fund payments arising from early retirements.
- Updating member records to ensure compliance with the McCloud Remedy and in readiness for 2026 Annual Benefit Statements.
- Tidying up employer and member records to ensure members are allocated to the current employer and membership is at the correct status.

## 9. Conclusion

The transition to TWPF administration has been successfully completed with additional tasks delivered, exceeding initial expectations.

It is acknowledged that there has been some short-term disruption to service delivery, but this is very much an improving picture.

As we move beyond the initial transition phase, there are still a number of challenges that need to be addressed. Despite this, progress is being made and will continue to be made on an ongoing basis.

TWPF is already demonstrating added value at no additional addition cost. Over the coming years, we firmly believe that Teesside members and employers will see significant benefits from our shared administration service.

## Appendix One

Active Processes at the end of Quarter 3 2025/26

Position on Major Processes 18 December 2025											
TPF	Avg. No. New Processes per week	Avg No. Processes Completed per week - Previous Year	Active Processes Last Week 11-Dec-2025	Active Processes This Week 18-Dec-2025	Active Process	New Processes This Week 18-Dec-2025	Pended Processes This Week 18-Dec-2025	Processes Completed This Week 18-Dec-2025	Processes Abandoned This Week 18-Dec-2025	Total Completed / Abandoned This Week 18-Dec-2025	
					▲ Increase ▼ Decrease ► No Change						
<b>Pensions LPI Priority 1</b>											
Deaths	60	58	191	182	▼ 9	32	100	51	2	53	
Immediate Benefits	89	88	246	266	▲ 20	57	232	35	1	36	
Transfers In	13	13	25	29	▲ 4	6	17	3	0	3	
Sub Total	162	159	462	477	▲ 15	95	349	89	3	92	
<b>Pensions LPI Priority 2</b>											
Deferred Retirements	105	105	728	754	▲ 26	91	80	51	9	60	
Recalculations - Benefits Paid	12	9	55	55	► 0	0	0	0	0	0	
Provisional Quote	14	12	136	138	▲ 2	3	5	1	0	1	
Deferments	106	93	1,048	1,129	▲ 81	87	67	10	1	11	
Refunds	116	102	643	681	▲ 38	84	223	44	2	46	
Recalculations - Other	18	17	53	54	▲ 1	1	0	0	0	0	
Divorce	8	7	13	10	▼ 3	2	8	4	0	4	
Transfers Out	26	25	15	14	▼ 1	5	38	8	2	10	
Joiners	50	52	0	0	► 0	0	0	0	0	0	
Personal Updates - Employer Notified	17	17	13	18	▲ 5	10	0	5	0	5	
Personal Updates - Member Notified	6	5	18	26	▲ 8	8	0	0	0	0	
Change Scheme Section	3	4	59	56	▼ 3	2	0	5	0	5	
Sub Total	481	448	2,781	2,935	▲ 154	293	421	128	14	142	
<b>Pensions LPI Priority 3</b>											
Deaths Supplementary	85	84	304	295	▼ 9	38	64	36	3	39	
Pension Monetary Changes	58	65	355	393	▲ 38	43	12	7	0	7	
DWP Trace	10	7	30	32	▲ 2	1	9	2	1	3	
Returned Mail (Pensioners)	0	0	135	135	► 0	0	0	0	0	0	
AVC/APC	16	19	264	201	▼ 63	2	87	88	1	89	
Interfunds In	30	24	108	125	▲ 17	14	105	8	1	9	
Interfunds Out	23	18	162	167	▲ 5	31	74	16	2	18	
Aggregation	334	262	827	809	▼ 18	69	91	91	27	118	
Opt Out Less than 3 months	14	18	191	189	▼ 2	6	0	7	0	7	
CARE Updates	19	18	512	553	▲ 41	51	0	9	4	13	
MMD	289	275	435	410	▼ 25	30	0	55	0	55	
Annual Allowance	4	15	145	145	► 0	0	6	0	0	0	
Ops Other	91	108	365	391	▲ 26	45	0	98	0	98	
Sub Total	973	913	3,833	3,845	▲ 12	330	448	417	39	456	
Total	1,616	1,520	7,076	7,257		181	718	1,218	634	56	690

**Member Administration**

Nominations	7	6	150	148	▼ 2	6	0	4	0	4
Bank Changes	22	25	0	0	► 0	0	0	0	0	0
Address Changes	32	32	52	63	▲ 11	25	0	14	0	14
Communication Method Updates	1	1	0	0	► 0	0	0	0	0	0
Member WEB Queries	175	158	33	34	▲ 1	23	0	22	3	25
Returned Mail (Active/Deferred)	0	0	9	9	► 0	0	0	0	0	0
Comms Other	82	43	90	93	▲ 3	33	1	32	3	35
<b>Sub Total</b>	<b>319</b>	<b>265</b>	<b>334</b>	<b>347</b>	<b>▲ 13</b>	<b>87</b>	<b>1</b>	<b>72</b>	<b>6</b>	<b>78</b>

**Payroll Processes**

Leavers from Payroll	42	42	0	0	► 0	0	0	0	0	0
P60/Payslip Request	12	15	0	0	► 0	0	0	0	0	0
Invoice Request	13	14	0	0	► 0	0	0	0	0	0
General Correspondence	1	6	0	0	► 0	0	0	0	0	0
<b>Sub Total</b>	<b>68</b>	<b>77</b>	<b>0</b>	<b>0</b>	<b>► 0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Pensions, Member Administration and Payroll Process Total**

Total	2,003	1,862	7,410	7,604	194	805	1,219	706	62	768
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**Impact of Bulk Data Loading of Information**

We have been using Bulk Data Inputs to load Personal Updates, Hour Change Information and Joiner Information. These changes are not reflected in the figures above.

The numbers of changes loaded are as follows

<b>From 01/04/25 to date</b>			
	Personal Changes	Hour Changes Loaded	Joiners
Total Loaded at End of Previous Week	2	261	799
Total Loaded to Date	2	261	799
Increase Over Previous Week	0	0	0

**Appendix Two****Teesside Pensions Fund's Performance against Disclosure Standards up to 31 December 2025**

Consistently achieve the service standards – Disclosure Regulations – Target is 100%

No.	Performance Indicator	Team Responsibility	2025/26	
			Cases Processed Year to Date	Achieved Standard Year to Date (%)
1	Death of a member (Combined to include active deferred and pensioner)	Benefits and Bereavements Manager	150	63%
2	Death in service - (Revised)	Benefits and Bereavements Manager	0	0%
3	Deferred Benefit – Notification of entitlement	Transfers and Early Leavers Manager	846	100%
4	Deferred Benefit into Payment	Benefits and Bereavements Manager	964	66%
5	Deferred Refund into Payment	Transfers and Early Leavers Manager	532	95%
6	Divorce Quotation	Transfers and Early Leavers Manager	89	98%
7	Estimate of Benefits	Benefits and Bereavements Manager	137	91%
8	Immediate Pension	Benefits and Bereavements Manager	1,113	57%
9	Immediate Pension (Revised)	Benefits and Bereavements Manager	0	0%
10	Joiner not BDI	Employer Services Manager	426	51%
11	Joiner BDI	Employer Services Manager	855	17%
12	Refund	Transfers and Early Leavers Manager	777	87%
13	Refund (Revised)	Transfers and Early Leavers Manager	327	8%
14	TV In Quotation	Transfers and Early Leavers Manager	56	96%
15	TV Out Quotation	Transfers and Early Leavers Manager	104	94%
16	TV Out Payment	Transfers and Early Leavers Manager	25	80%

## Appendix Three

**SAB Administration Key Performance Indicators at 31 December 2025 (Quarter 3)****Table A – Total number of casework**

A – ADMINISTRATION KEY PERFORMANCE INDICATORS				
Table A - Total number of casework				
Ref	Casework KPI	Total no. new cases created in the year (April to December)	Total no. of cases Completed in year (1 April to December)	Total % of cases completed in year
A1	Deaths recorded of active, deferred, pensioner and dependent members	407	292	39%
A2	New dependent member benefits	126	124	98%
A3	Deferred member retirements	1,678	1,187	54%
A4	Active member retirements	1,431	935	57%
A5	Deferred benefits	1,543	263	6%
A6	Transfers in (including interfunds in, club transfers)	168	122	63%
A7	Transfers out (including interfunds out, club transfers)	408	361	82%
A8	Refunds	1,776	813	43%
A9	Divorce quotations issued	115	99	71%
A10	Actual divorce cases	7	6	40%
A11	Member estimates requested either by scheme member and employer	310	166	50%
A12	New joiner notifications	0	0	0%
A13	Aggregation cases	2,023	1,112	17%
A14	Optants out received after 3 months membership			

**Table B – Time taken to process casework**

Table B - Time taken to process casework			
Ref	Casework KPI	Suggested fund target*	% completed within fund target in year
B1	Communication issued with acknowledgement of death of active, deferred, pensioner and dependent member	5 days	84%
B2	Communication issued confirming the amount of dependents pension	10 days	74%
B3	Communication issued to deferred member with pension and lump sum options (quotation)	15 days	68%
B4	Communication issued to active member with pension and lump sum options (quotation)	15 days	76%
B5	Communication issued to deferred member with confirmation of pension and lump sum options (actual)	15 days	90%
B6	Communication issued to active member with confirmation of pension and lump sum options (actual)	15 days	96%
B7	Payment of lump sum (both actives and deferreds)	15 days	93%
B8	Communication issued with deferred benefit options	30 days	50%
B9	Communication issued to scheme member with completion of transfer in	15 days	90%
B10	Communication issued to scheme member with completion of transfer out	15 days	100%
B11	Payment of refund	10 days	84%
B12	Divorce quotation	45 days	98%
B13	Communication issued following actual divorce proceedings i.e application of a Pension Sharing Order	15 days	83%
B14	Communication issued to new starters	40 days	98%
B15	Member estimates requested by scheme member and employer	15 days	89%